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Consistently Excellent
Efficient Private Clients
BCI Spier Conference June 2017

دولة الامارات العربية المتحدة
UNITED ARAB EMIRATES

إقامة
RESIDENCE

استوفيت الرسوم

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جهة الاصدار : دبي
Place of Issue DUBAI

عدد المرافقين :
Accompanied by

تاريخ إصدار
Issue Date 2018/08/17

تاريخ الانتهاء
Expiry Date 2017/08/17

التوقيع :
Sign.

تعتبر الإقامة لاغية اذا تجاوز حاملها الاقامة خارج دولة الامارات مدة ستة اشهر

Residence Permit becomes invalid if bearer resides out of the U.A.E. for more than six months.

WHY INVEST IN EQUITIES?

WHY INVEST IN EQUITIES AT ALL?

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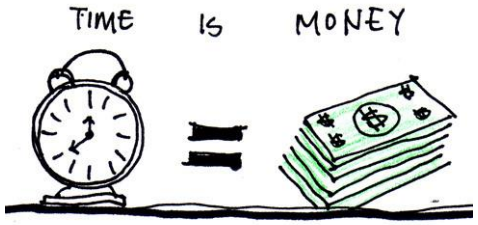
To illustrate the effect of time we look at the best and worst annualised return of equities over each rolling period since 1971.

Holding Period	Best Annualised Return	Worst Annualised Return
1 Year	129.70%	-32.11%
5 Years	50.07%	3.79%
10 Years	38.49%	10.60%
15 Years	29.01%	12.91%
20 Years	26.43%	14.94%
25 Years	23.43%	14.77%
30 Years	23.58%	17.32%



Time in the market; not timing the market.

SHOULD YOU INVEST LOCALLY OR ABROAD?

WHY INVEST LOCALLY?

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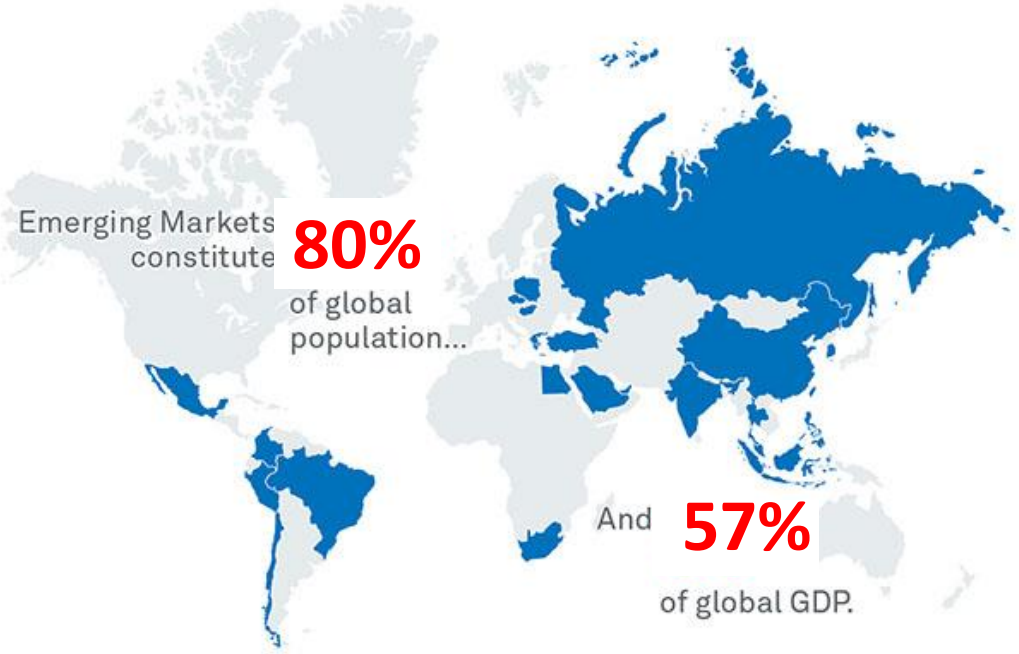
- Consistently outperform inflation.
- Important to understand the difference between **risk** and **volatility.**
- Both pre- and post retirement = significant exposure to equities.
- Invest in the country where you live and consume.
- Emerging markets should deliver higher returns.
- Dual-listed (rand hedge) companies.



WHY INVEST GLOBALLY?

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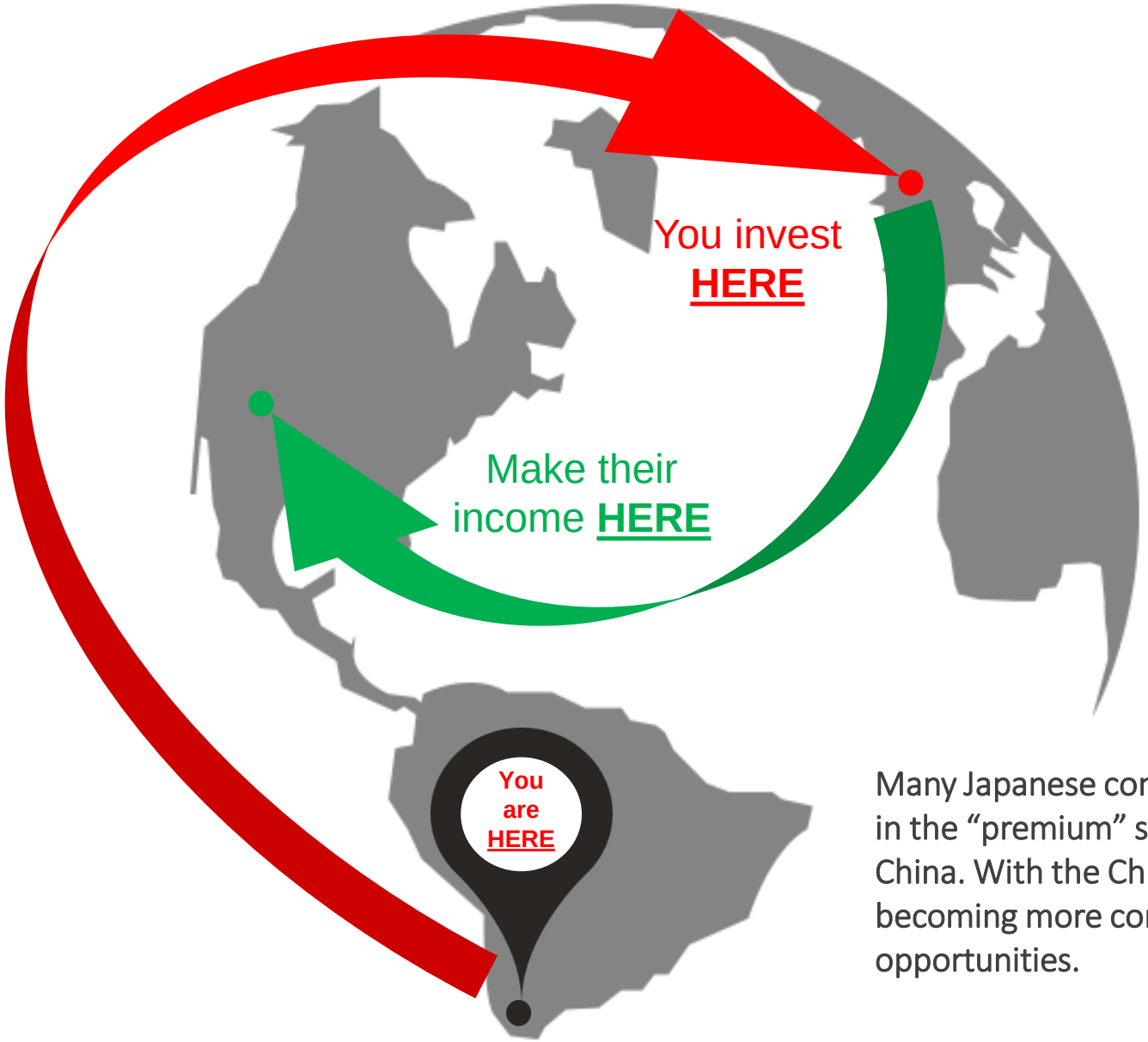
- Hedge against local uncertainty
- Bigger investment universe = BIGGER opportunities
- Greater diversification make for greater possibilities

Your options investing locally

Geographical Revenue Streams



Many Japanese consumer goods companies compete in the “premium” segment which is rapidly growing in China. With the Chinese economy maturing and becoming more consumer driven this creates opportunities.

CURRENCY CONSIDERATIONS

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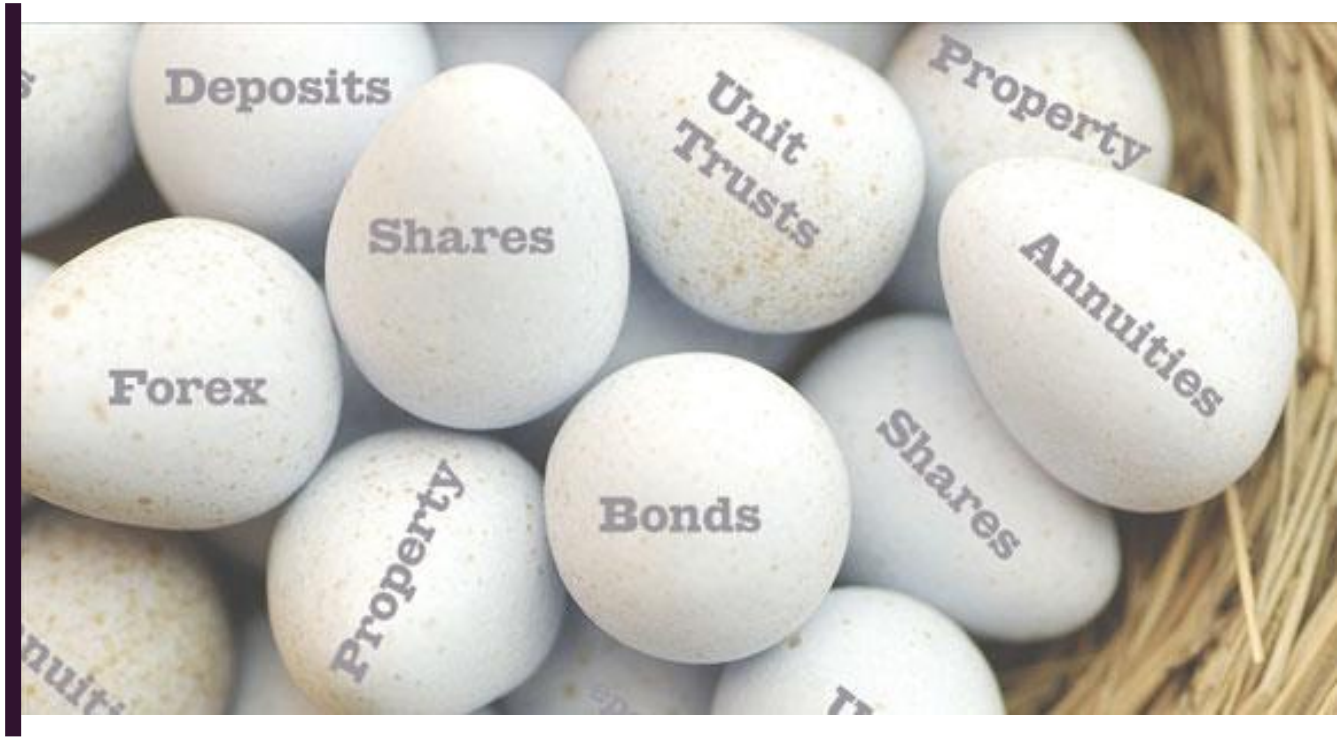
- Achieve superior investment returns
- Currency movements will never be the primary consideration
- A well-diversified portfolio (across sectors and geographical area) provides the investor with the best long-term returns while reducing volatility



HOW TO INVEST OFF-SHORE

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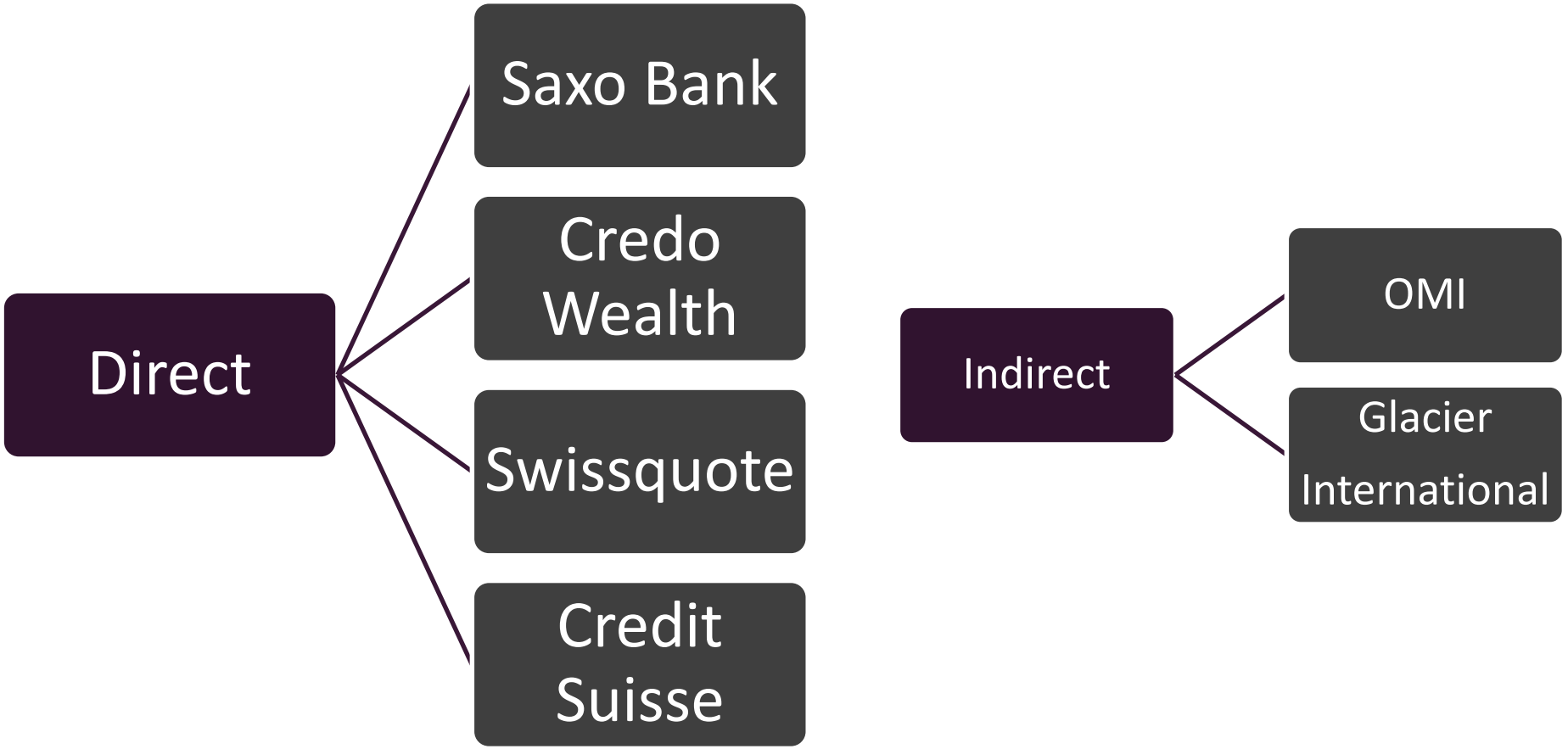

WHICH IS BEST FOR YOU? DIRECT OR INDIRECT?

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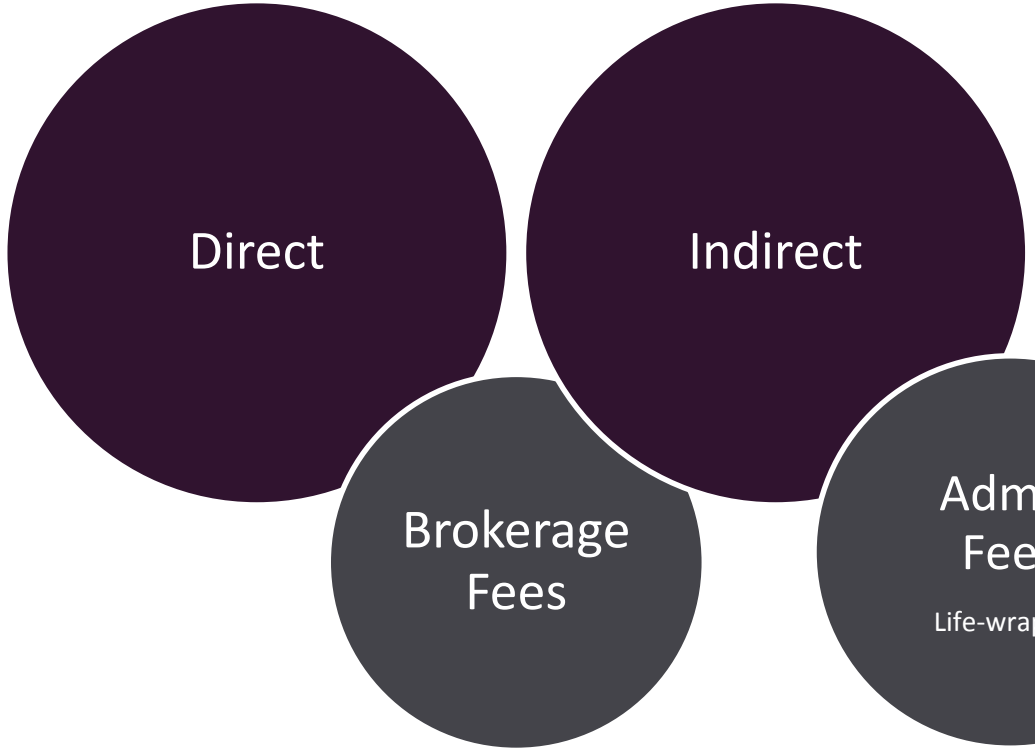

Benefits of using the wrapper

- No situs taxes
- Tax-efficiency & simplicity
- Protection from creditors
- Continuity
- Liquidity

WHAT MAKES US DIFFERENT…

OUR INVESTMENT PHILOSOPHY

THE THREE PILLARS OF THE COMMITTEE

Portfolio Research and Construction - MenteNova and EFPC

Economic Research and Reviews – Efficient Private Clients

Portfolio Management - Efficient Private Clients

HOPING TO DO BUSINESS WITH YOU!