

INVESTMENT REPORT



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CHINA: THE INVESTMENT OPPORTUNITY OF A LIFETIME

By Magnus Heystek -Investment Strategist

Perhaps once in a generation an investment opportunity comes along that has the potential to generate not just high returns but genuinely life-changing results. An investment in China could just be one of those moments.

On Tuesday 23rd November, Brenthurst Wealth will be hosting its last investment seminar for the year for its clients in the Johannesburg area (details below). The seminar will also serve as our year-end function.

Our guest speaker will be the highly rated Michael Powers, global investment strategist at Investec Asset Management and an acknowledged expert on China and other rapidly-growing Asian countries.

China has just taken over as the second largest economy in the world. In a new report, released just days ago, global banking giant Standard Chartered has predicted that China will become the largest economy in the world in the NEXT TEN YEARS and not in the next 20 to 30 years as is commonly thought.

Brenthurst Wealth is extremely honoured to have a speaker of Michael's caliber to address our clients and guests on this thought-provoking and potentially very profitable topic.

In a talk titled *"The Hitchhikers Guide to the Asian Galaxy"* Powers will provide a deep insight to the global forces that are changing the economic and political world at a rate much faster and with far greater implications than is generally thought.

In fact, most South African investors are far too inwardly focused as far as their investment strategies are concerned.

Only yesterday (November 15th 2010) Standard Chartered released a report forecasting that China will overtake the US economy in the next TEN YEARS, helped by faster expansion and an appreciation of its currency.

"We believe that the world is in a super-cycle of sustained high growth", economists led by Gerard Lyons said in a report on Bloomberg on Monday. "The scale of change over the next 20 years will be enormous".

SEMINAR JOHANNESBURG

DATE: TUES, 23 NOV 2010

TIME: 15H30 FOR 16H00

VENUE: INVESTEC: 100 GRAYSTON DRIVE | SANDTON | JHB

RSVP: JHB: +27 11 799 8100 OR email reception@brenthurstwealth.co.za

PROGRAMME

15h30 –16h00 Registration

17h30 –18h00 Questions & Discussions

16h00 –17h30 Presentations

18h00 –20h00 Refreshments



CHINA

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Global
Markets
AND SA ECONOMY

On the same day it was announced by the Chinese premier Wen Jiaobao that China had officially overtaken Japan as the second largest economy, edging past Japan after yet another quarter of robust economic growth.

China's economy will be twice as large as the US by 2030 and account for 24 percent of global output, up from 9 percent today, Lyons said in the 195-page Super Cycle Report.

India will surpass Japan to be the biggest economy in the next decade, according to the report.

Previously Goldman Sachs forecast that China will overtake the US by 2027-30 but this latest study is bound to electrify fund managers, investors and politicians all over the world.

It would seem as if the current generation will be witness to one of the speediest transfers of economic power from one region to another in the history of mankind. Previously such transfers of power had taken centuries. If this report is even remotely accurate China would have transformed itself from a backward and poor communist country to the largest economy in the world in just over 40 years.

The world may be experiencing it's third "super-cycle" which is defined as "a period of historically high global growth, lasting a generation or more, driven by increasing trade, high rates of investment, urbanization and technological innovation, characterized by the emergence of large, new economies, first seen in high catch-up growth rates across the emerging world," the report says.

We urge all clients of Brenthurst Wealth to attend this seminar. Booking is essential and we expect this event to be extremely popular.

The event takes place at Investec Head Office, 100 Grayston Drive, Sandton and commences at 16h00. It will be followed by drinks and snacks. To book call Antje Mouton (011) 7998100 or email reception@brenthurstwealth.co.za.

A full-report on the talk plus further information about the enormous growth opportunities of China and other countries in the Asian region will be forwarded to all clients of Brenthurst Wealth after next week's seminar.

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Kindly contact BWM at (011) 799-8100 for an appointment.