



Portfolio Description

The Kingfisher Portfolio invests capital on behalf of its clients via managed accounts. The Portfolio is best characterized as a “Best Ideas Portfolio”. The strategy seeks to achieve capital growth by investing in concentrated portfolio of very liquid assets.

With the Kingfisher Portfolio the client own businesses and these businesses have a value independent of the stock price. Analyzing that value is, according to the manager, a more objective understanding process than forecasting markets.

Strategy

The strategy focuses on investing in companies that should at least perform as well as the markets. However, each selected company has potential catalyst that if played out, it could push the stock price to new highs. Some of these catalysts include: Strong growth potential, Valuation, Out-of-favor stocks, Restructuring, Buyout potential, Future split, IPO, Dividend yield, Beaten down share price, Future drug approval or Recovery situations.

Patience is a key ingredient to this model, once comfortable with a company and its potential, the manager invests and wait for the catalyst to play out.

Historical Performance %

YEAR	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
ROYAL KINGFISHER	92,07	31,64	-12	15,71	39,63	2,70	0,46	2,87	25,64	-1,2	31,44	22,98	16,79	-19	8,30
S/P 500 INDEX	23,45	12,78	0,00	13,41	29,60	11,4	-0,7	9,54	19,42	-6,2	28,88	16,26	26,89	-19	4,58

Kingfisher Portfolio
Managed Account

Launch Date 2009
Advisor FCM SA
Management Fee 1,50%

Entry Fee 0%
Exit Fee 0%
Min Investment \$US 500,000
Currency \$US

Contact

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