

RESEARCH-WORKS

Different Thinking For Difficult Times : 10 Profitable Ideas

*‘ We Do The Longer-Term Thinking On Asia, From Korea to India,
From Macro to Micro, By Identifying the Big Ideas and Misconceptions ’*

- ‘ Yuan to Revalue: Buy H Shares ’ – **Up 341% since October 2001**
- ‘ \$60 –70 Oil Possible ’ – **When \$37: Achieved**
- ‘ Buy Commodities ’ – **Copper +130%, Rubber +106%, Palm Oil + 70% Since 2001**
- ‘ Deflation Has Ended in Home Appliances ’ – **August 2006: 12 Months Ahead of Consensus**
- ‘ Dollar Weakening Ahead ’ – **Euro Up 45%, Baht 23%, S\$ 17%**
- ‘ China’s CPI to Fall to 4.5% End 08 ’ – **When 8.3%: Latest 2.4%**
- ‘ Buy POSCO ’ – **Up 57% v Market’s Down 8%**
- ‘ Sell Fountain Set ’ – **Down 76%**
- ‘ Sell China Developers ’ - **Five Sells Fell 50%, Hang Seng Down 25%**
- ‘ Sell UTStarcom ’ – **Down 96%**

First to Call a Yuan Revaluation (When Market Still Expected Devaluation)