



Educational Seminar
Feb 28, 2017

Investment Basics -
Outlook 2017 and current strategy

What have we achieved in our first year of operation?

Kick off event of our company: March 10th 2016

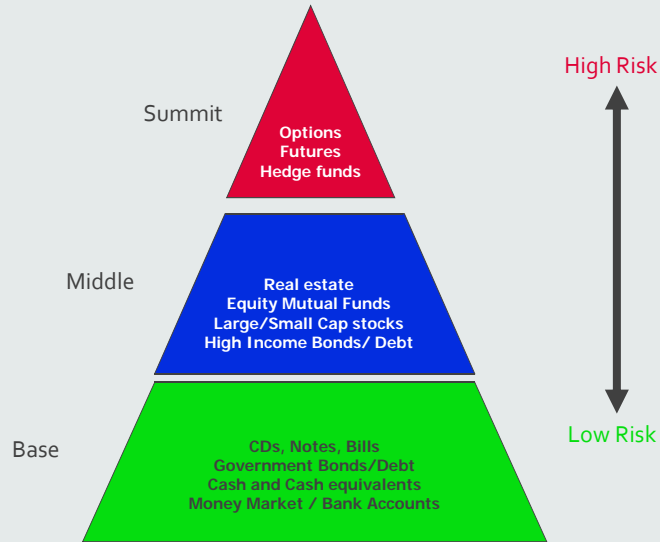
- Registration with financial market authorities (FMA)
- First assets arrived in April 2016
- Feb 2017: 12 clients with approx. \$3 MLN in assets
- 2 “meet, eat and learn” events and 1 retirement forum
- Over 100 prospects and attendees at all events

Upcoming projects:

- Quarterly and print media for Financial Education (launch 2.Q 2017) in cooperation with an Austrian daily and online newspaper: Börse Express

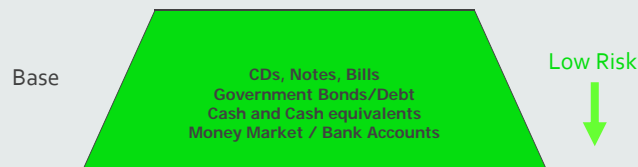


Risk & Return



Traditional Investments

- Certificate of Deposits:
 - Certificate to the bearer to receive interest Issued by
 - banks and financial institutions for 1 month to years
- US Treasury Notes and Bills (short/long term)
- Government Bonds (fixed income securities paying coupons)
- Cash and Cash equivalents (liquid assets paying interests)
- Money Market Funds:
 - Cash Type of risk-free debt investment that has slightly better returns than savings
 - Typically mature in less than 1 year
 - Very liquid (easy to buy/sell and convert to cash)

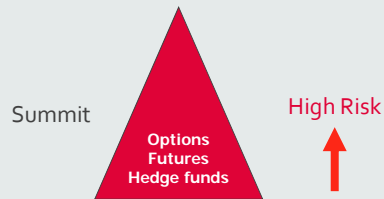


Traditional Investments

1. Real estate (as an investment, tenant paying back mortgage)
2. Equity Mutual Funds (various types and strategies)
3. Stocks (listed on stock markets Shares in companies, paying dividends)
4. High Income Bonds/ Debt



Traditional Investments



1. Derivatives: investing in Options and futures markets
2. Hedge funds (various types and strategies)
3. Private equity or funds
4. Junk Bonds (With low rating)

World markets YTD



World equity index

GRAB

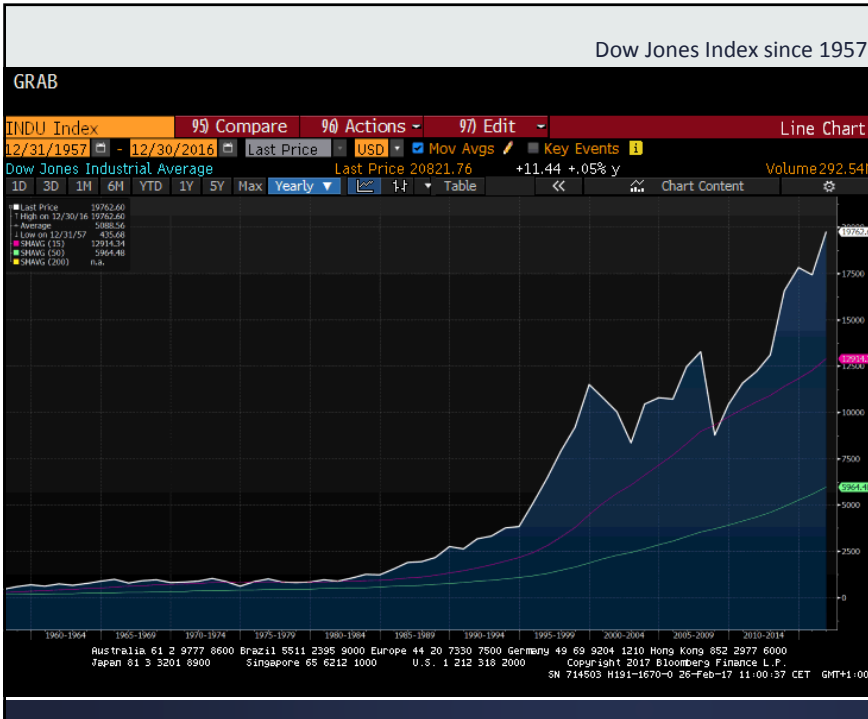
99 News 95 Settings World Equity Indices

Standard	Movers	Volatility	Ratios	Futures	Δ AVAT	10D	%Chg YTD	EUR
1) Americas								
1) DOW JONES	2Day	Value	Net Chg	%Chg	Δ AVAT	Time	Adv/Dcl	P/E DvYld
12) S&P 500		2367.34 d	+3.53	+0.15%	+4.36%	02/24 c	320 / 179	21.79 1.99
13) NASDAQ		5845.31	+9.80	+0.17%	-12.62%	02/24 c	1202 / 1146	42.59 1.16
14) S&P/TSX Comp		15533.46 d	-247.74	-1.57%	+21.36%	02/24 c	29 / 218	22.55 2.70
15) MEX IPC		47047.67 d	-158.69	-0.34%	+8.86%	02/24 c	11 / 24	24.12 1.85
16) IBOVESPA		66662.10 d	-799.29	-1.18%	-3.72%	02/24 c	18 / 41	37.50 2.70
2) EMEA								
21) Euro Stoxx 50		3304.09 d	-29.87	-0.90%	+34.48%	02/24 c	7 / 43	19.52 3.56
22) FTSE 100		7243.70 d	-27.67	-0.38%	+5.10%	02/24 c	37 / 57	39.72 3.89
23) CAC 40		4845.24 d	-46.05	-0.94%	+24.47%	02/24 c	4 / 36	20.88 3.36
24) DAX		11804.03 d	-143.80	-1.20%	+23.77%	02/24 c	2 / 27	17.34 2.62
25) IBEX 35		9453.50 d	-39.90	-0.42%	+31.27%	02/24 c	8 / 27	17.41 3.98
26) FTSE MIB		18596.66 d	-222.83	-1.18%	+42.21%	02/24 c	5 / 33	-- 3.78
27) OMX STKH30		1569.86	-18.44	-1.16%	+31.02%	02/24 c	3 / 26	18.82 3.97
28) SWISS MKT		8525.62 d	-43.74	-0.51%	+7.92%	02/24 c	3 / 16	26.65 3.40
3) Asia/Pacific								
31) NIKKEI		19283.54 d	-87.92	-0.45%	+11.81%	02/24 c	53 / 163	22.66 1.69
32) HANG SENG		23965.70 d	-149.16	-0.62%	-26.85%	02/24 c	16 / 31	13.25 3.49
33) CSI 300		3473.85 d	+0.53	+0.02%	-16.12%	02/24 c	147 / 118	15.53 1.98
34) S&P/ASX 200		5738.98	-45.68	-0.79%	+27.58%	02/24 c	51 / 133	19.74 4.06

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Dow Jones Index since 1957



World equity index rankings

GRAB

Settings World Equity Index Rankings

Region Primary Indices Only Period YTD 12/30/16 - 02/24/17 Total Return Currency EUR

Negative Total Return		Groups (96)	Return	Positive Total Return
		Primary Equity Indices	5.09%	
		Best Performing		
	11)	Kazakhstan KASE Stock Ex	23.69%	
	12)	JSE MARKET INDEX	21.21%	
	13)	KUWAIT SE PRICE INDEX	17.71%	
	14)	Ukrainian Equities Index	16.84%	
	15)	WIG 20	15.96%	
	16)	ARGENTINA MERVAL INDEX	15.21%	
	17)	BRAZIL IBOVESPA INDEX	14.85%	
	18)	CROATIA ZAGREB CROBEX	14.40%	
	19)	EGX 30 INDEX	13.95%	
	20)	EGX 30 INDEX	13.95%	
		Worst Performing		
	21)	BEL 20 INDEX	-0.77%	
	22)	PSI 20 INDEX	-1.05%	
	23)	Botswana Gaborone Dom	-1.21%	
	24)	RUSSIAN RTS INDEX \$	-2.18%	
	25)	SRI LANKA COLOMBO ALL SH	-2.60%	
	26)	SLOVAK SHARE INDEX	-2.66%	
	27)	TADAWUL ALL SHARE INDEX	-3.00%	
	28)	FTSE MIB INDEX	-3.08%	
	29)	NIGERIA STCK EXC ALL SHR	-6.03%	
	30)	Nairobi All Share	-6.34%	

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World Bond Markets

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Regional 97 Settings World Bond Markets

91 Bonds 92 Spreads 93 Curves

Maturity 10 Year Trading Mode Data Range 3 Months

Country	CMI	Security	Bid	Ask	Yield	Yld Chg	Yield	Low	Range	High	3M Chg
1) Americas											
10) United States		T 2 1/2 02/27	99.14	99.14+	2.312	-6.0		2.291		2.597	-4.6
11) Canada		CAN1 1/2 06/26	99.084	99.142	1.600	-6.5		1.503		1.831	+4.6
12) Brazil (USD)		BRAZIL6 04/26	109.080	109.440	4.712	-1.8		4.682		5.577	-69.9
13) Colombia (USD)		COLOM 3 1/2 27	99.855	100.185	3.851	+0.5		3.668		4.291	-51.6
14) Argentina (USD)		ARGENT7 1/2 26	104.886	105.424	6.695	+1.6		6.522		7.510	-30.4
15) Mexico (USD)		MEX4 1/2 01/26	102.425	102.750	3.758	-4.8		3.758		4.346	-55.7
2) EMEA											
21) United Kingdom		UKT1 1/2 07/26	103.766	103.818	1.072	-7.8		1.072		1.511	-34.1
22) France		FRTR 0 1/2 26	93.716	93.822	0.916	-5.4		.645		1.133	+14.2
23) Germany		DBR0 1/2 02/27	100.632	100.676	0.181	-4.6		.168		.479	-5.4
24) Italy		BTPS 1 1/2 26	91.840	91.956	2.181	-2.3		1.735		2.358	+9.6
25) Spain		SPGB 1 1/2 27	98.165	98.353	1.678	-7.1		1.318		1.769	+10.9
26) Portugal		PGB2 7/8 07/26	91.798	92.211	3.879	-4.3		3.472		4.194	+31.2
27) Sweden		SGB1 11/12/26	104.254	104.446	0.529	-6.0		.482		.740	+1.0
28) Netherlands		NETHER0 3/4 27	102.736	102.841	0.469	-6.7		.310		.687	+6.2
29) Switzerland		SWISS 3 1/2 27	136.180	136.970	-0.275	-2.8		-2.275		-0.93	-3.6
30) Greece		GGB3 02/24/27	76.128	77.256	6.983	-11.0		6.380		7.653	+17.5
3) Asia/Pacific											
31) Japan		JGB 0.1 12/26	100.311	100.409	0.058	-1.1		.005		.102	+2.9
32) Australia		ACGB 4 3/4 27	117.755	117.832	2.726	-10.4		2.639		2.869	-2.3
33) New Zealand		NZGB 4 1/2 27	110.708	111.090	3.208	-7.6		3.069		3.454	+3.3
34) South Korea		NDFB 1 1/2 26	94.230	94.465	2.168	-1.2		2.038		2.249	-3.3

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Staatsanleihen	1 Jahr	2 Jahre	3 Jahre	4 Jahre	5 Jahre	6 Jahre	7 Jahre	8 Jahre	9 Jahre	10 Jahre	Anteil der Anleihen mit neg. Rendite*	Negative Rendite bis
Schweiz	-0.96	-0.92	-0.91	-0.85	-0.81	-0.73	-0.68	-0.59	-0.53	-0.46	97%	2049
Japan	-0.32	-0.28	-0.28	-0.24	-0.21	-0.21	-0.21	-0.17	-0.13	-0.06	78%	2028
Deutschland	-0.66	-0.67	-0.67	-0.62	-0.52	-0.47	-0.41	-0.30	-0.18	-0.02	86%	2028
Niederlande	-0.67	-0.64	-0.61	-0.58	-0.41	-0.41	-0.32	-0.18	-0.02	0.10	77%	2025
Dänemark	-0.60	-0.54	-0.42	-0.30	-0.32	-0.10	-0.05	-0.13	0.01	0.08	71%	2024
Österreich	-0.46	-0.60	-0.56	-0.48	-0.42	-0.36	-0.32	-0.25	0.04	0.20	68%	2024
Belgien	-0.65	-0.65	-0.57	-0.51	-0.42	-0.35	-0.26	-0.10	0.08	0.23	61%	2024
Frankreich	-0.62	-0.62	-0.58	-0.49	-0.37	-0.28	-0.21	-0.02	0.13	0.28	69%	2024
Schweden	-0.77	-0.65	-0.40	-0.49	-0.29	-0.21	-0.13	0.05	0.17	0.28	78%	2024
Spanien	-0.25	-0.22	-0.13	-0.01	0.10	0.18	0.35	0.66	0.83	1.01	41%	2019
Italien	-0.24	-0.10	0.02	0.10	0.33	0.52	0.72	0.94	1.17	1.34	30%	2018
Norwegen	0.52	0.58	0.74	0.65	0.94	0.85	1.07	1.14	1.21	1.27	0%	-
Großbritannien	0.15	0.12	0.13	0.23	0.28	0.41	0.53	0.65	0.77	0.87	0%	-

US treasury bond, 10 years


GRAB

T 2 4 02/15/27 Govt 97 Settings Page 1/11 Security Description: Bond
 95 Buy 96 Sell

25 Bond Description 26 Issuer Description

Pages	Issuer Information	Identifiers	
1) Bond Info	Name US TREASURY N/B	ID Number 912828V98	
2) Addtl. Info	Industry US GOVT NATIONAL	CUSIP 912828V98	
3) Covenants	Security Information		
4) Guarantors	ISIN US912828V988	ISIN US912828V988	
5) Bond Ratings	Issue Date 02/15/2017	SEDOL 1 BYPG9T2	
6) Identifiers	Interest Accrues 02/15/2017	FIGI BBG00FX263Y5	
7) Exchanges	1st Coupon Date 08/15/2017	Issuance & Trading	
8) Inv Parties	Maturity Date 02/15/2027	Issue Price 99.263516	
9) Fees, Restrict	Floater Formula N.A.	Risk Factor 8.828	
10) Schedules	Workout Date 02/15/2027	Amount Issued 23000 (MM)	
11) Coupons	Coupon 2.250	Amount Outstanding 23000 (MM)	
Quick Links	Cpn Frequency S/A	Security Type USN	
32) ALLQ Pricing	Type FIXED	Minimum Piece 100	
33) QRD Quote Recap	Mty/Refund Type NORMAL	Series	
34) CACS Corp Action	Calc Type STREET CONVENTION	Minimum Increment 100	
35) CN Sec News	Day Count ACT/ACT	SOMA Holdings 11.546	
36) HDS Holders	Market Sector US GOVT		
	Country US	Currency USD	
	TENDERS ACCEPTED: \$23000MM.		
66) Send Bond			

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German Government bond 10 years


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DBR 0 4 02/15/27 Corp 97 Settings Page 1/11 Security Description: Bond
 94 Notes 95 Buy 96 Sell

25 Bond Description 26 Issuer Description

Pages	Issuer Information	Identifiers	
11) Bond Info	Name BUNDESREPUB. DEUTSCHLAND	ID Number AL9975494	
12) Addtl. Info	Industry Sovereigns	ISIN DE0001102416	
13) Covenants	Security Information		
14) Guarantors	Mkt Iss Euro-Zone	FIGI BBG00FPC24R2	
15) Bond Ratings	Country DE	Currency EUR	
16) Identifiers	Rank Unsecured	Series	
17) Exchanges	Coupon 0.250000	Type Fixed	
18) Inv Parties	Cpn Freq Annual		
19) Fees, Restrict	Day Cnt ACT/ACT	Iss Price 98.91000	
20) Schedules	Maturity 02/15/2027	Issuance & Trading	
21) Coupons	BULLET	Amt Issued/Outstanding	
Quick Links	Iss Sprd	EUR 8,000,000.00 (M) /	
32) ALLQ Pricing	Calc Type (60)GERMAN BONDS	EUR 8,000,000.00 (M)	
33) QRD Quote Recap	Announcement Date 01/03/2017	Min Piece/Increment	
34) TDH Trade Hist	Interest Accrual Date 01/13/2017	0.01 / 0.01	
35) CAC Corp Action	1st Settle Date 01/13/2017	Par Amount 0.01	
36) CF Prospectus	1st Coupon Date 02/15/2018	Book Runner	
37) CN Sec News		Exchange Multiple	
38) HDS Holders	€1.4989 BLN RETAINED FOR MARKET INTERVENTION. AUCTION 03/01/2017.		
39) VPR Underly Info			
66) Send Bond			

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World currency exchange rates on Feb 27th 2017

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99) Actions - Currency Rates Matrix

Basket Majors Last Price Rate Spot Date 02/27/17

Source CMPL % Change Outrights Points Heat Map

10) Spot 11) Forward 12) Fixing

	USD	EUR	JPY	GBP	CHF	CAD	AUD	NZD	HKD	NOK	SEK
SEK	9.0130	9.5255	.08033	11.235	8.9535	6.8804	6.9226	6.4875	1.1613	1.0793	
NOK	8.3505	8.8253	.07442	10.409	8.2954	6.3746	6.4138	6.0106	1.0759		.92650
HKD	7.7613	8.2025	.06917	9.6748	7.7100	5.9248	5.9612	5.5865		.92943	.86111
NZD	1.3893	1.4683	.01238	1.7318	1.3801	1.0606	1.0671		.17900	.16637	.15414
AUD	1.3020	1.3760	.01160	1.6230	1.2934	.99389		.93714	.16775	.15591	.14445
CAD	1.3100	1.3844	.01167	1.6329	1.3013		1.0061	.94290	.16878	.15687	.14534
CHF	1.0066	1.0639	.00897	1.2548		.76846	.77318	.72458	.12970	.12055	.11169
GBP	.80221	.84782	.00715		.79691	.61239	.61616	.57743	.10336	.09607	.08901
JPY	112.21	118.58		139.87	111.46	85.655	86.181	80.764	14.457	13.437	12.449
EUR	.94620		.00843	1.1795	.93995	.72231	.72675	.68107	.12191	.11331	.10498
USD		1.0569	.00891	1.2465	.99339	.76338	.76807	.71979	.12885	.11975	.11095

% Change on Day Range
 Below -2.5% -0.5% to -2.5% -0.05% to 0.... -0.05% to 0.... 0.05% to 0.5% 0.5% to 2.5% Above 2.5%

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World currency rankings based on EUR

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200) Actions - 201) Refresh 202) Table World Currency Ranker

203) Single Ranking 204) Historical Ranking 205) Multiple Ranking

Period Year To Date Basket G10 Base EUR

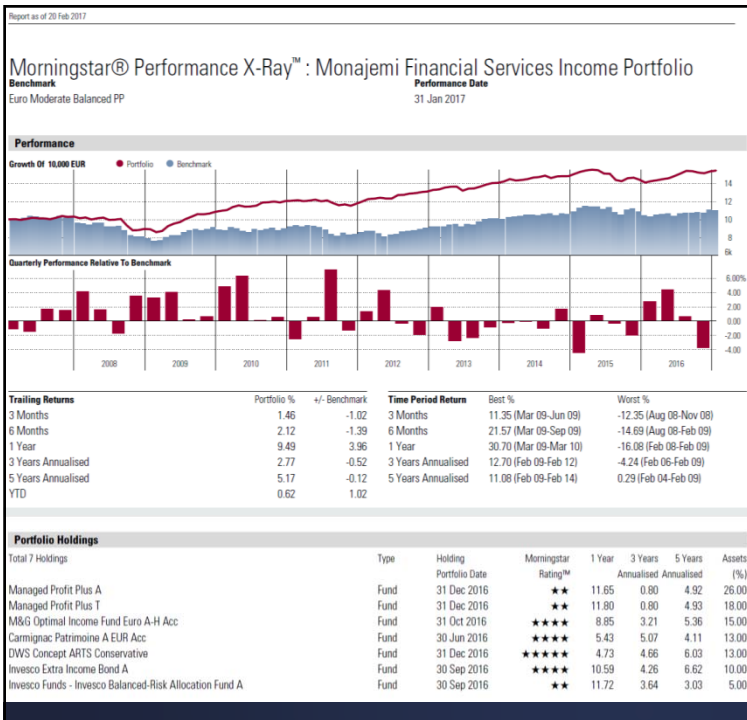
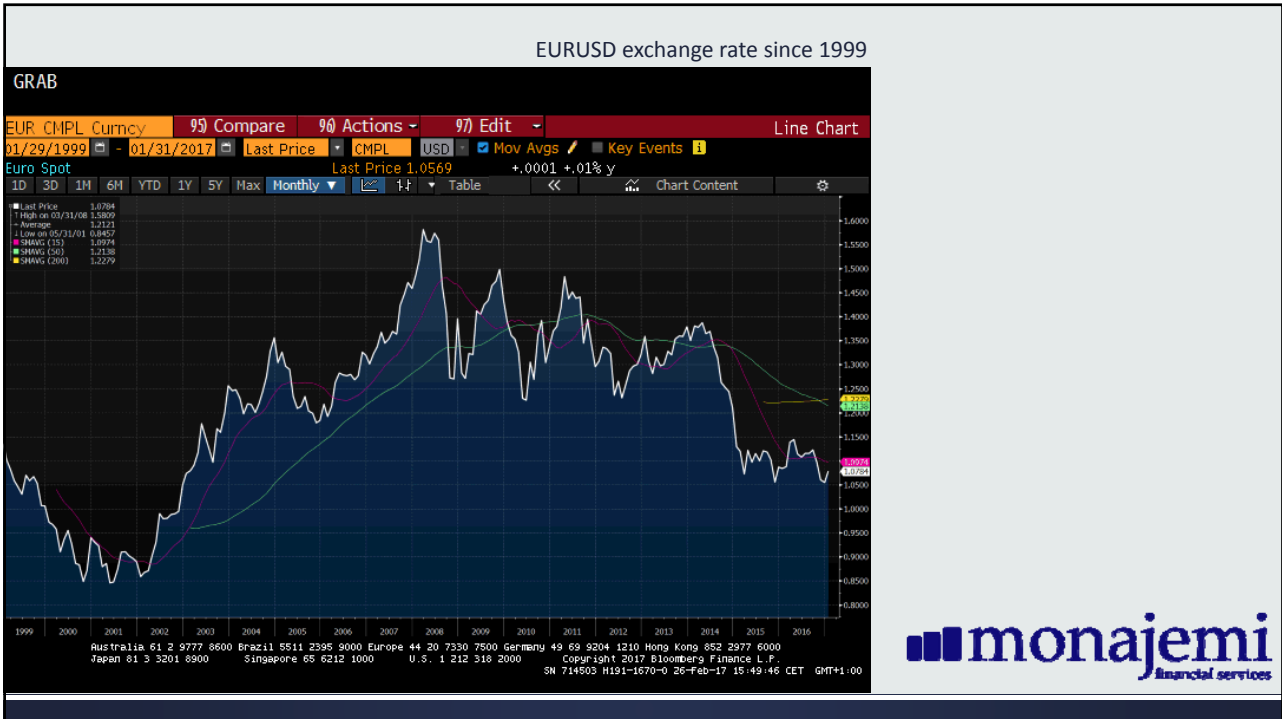
Range 12/30/16 - 02/24/17

Spot Returns (%)

1) Australian Dollar	AUD	6.21
2) Japanese Yen	JPY	3.73
3) New Zealand Dollar	NZD	3.47
4) Norwegian Krone	NOK	3.05
5) Canadian Dollar	CAD	2.46
6) Swiss Franc	CHF	0.83
7) British Pound	GBP	0.77
8) Swedish Krona	SEK	0.61
9) Danish Krone	DKK	0.00
10) United States Dollar	USD	-0.21

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Top 10 Portfolio Holdings

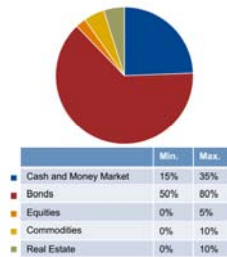
Name	Assets	Mean	Std Dev
1 Managed Profit Plus A	26.00	1.08	7.50
2 Managed Profit Plus T	18.00	1.08	7.50
3 M&G Optimal Income Fund Euro A-H Acc	15.00	3.23	3.69
4 Carmignac Patrimoine A EUR Acc	13.00	5.23	7.48
5 DWS Concept ARTS Conservative	13.00	4.70	5.45
6 Invesco Extra Income Bond A	10.00	4.27	4.42
7 Invesco Funds - Invesco Balanced-Risk...	5.00	3.74	5.71





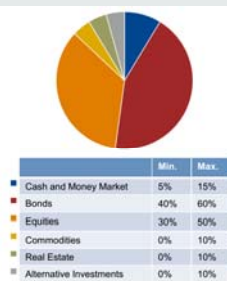
Investment Portfolio: Defensive

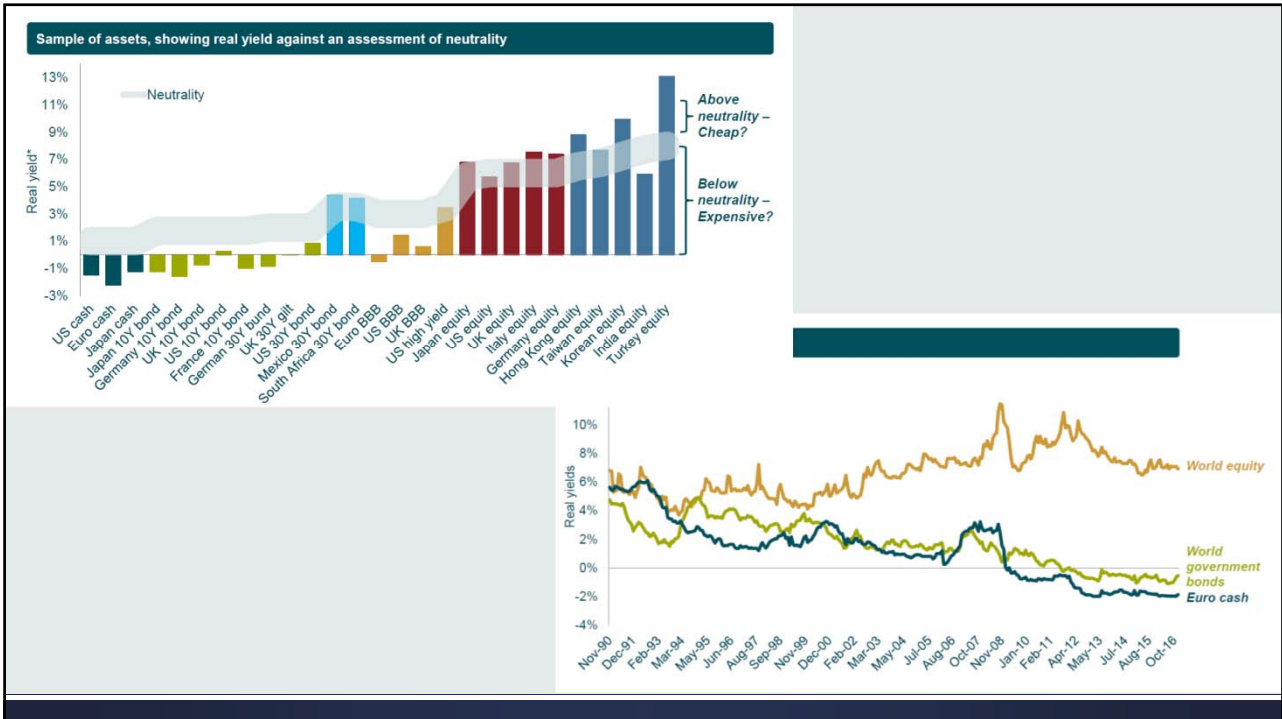
- Suitable for risk-averse investors, who value stability and predictability.
- Objective: Protection against inflation along with potentially higher long term returns than those available with bank deposits.
- Strategy: Investments in conservative mutual funds holding mainly money market funds, highly rated fixed income securities, with a small exposure to commodities and real estate.
- Higher stability due to the exclusion, or a very minor weighting, of equity funds.



Investment Portfolio: Balanced

- Suitable for investors who want to participate in equity markets, but who are also interested in maintaining some buffer against severe market swings.
- Objective: Potentially above average returns, with a medium level of risk.
- Strategy: Combination of money market instruments, fixed income securities, equities, real estate, commodities and alternative investments.
- Potentially higher returns can be achieved through investing in higher yielding funds.





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