

**Our original and proven Investment Philosophy:**

***“Never Fully Invest at All Times”***

**Dr. Tan Chong Koay**

**Pheim Asset Management Sdn Bhd Founder and Chief Strategist (since 1994)**  
*Veteran investment guru with over 44 years' investment experience. Named 'Warren Buffett of Asia' (2017); 'Second Board King of Malaysia' (1998); 'Southeast Asia's Small-Cap King' (2006).*



**Potential sector during despite the mid-year market rally in Bursa Malaysia and what is good value stocks out there?**

Shares move according to changes in environment. Fund managers need to adapt to changes. A favourite stock may turn out of favour. Banks were favourite at one time as they are growing very fast. It is now out of favour due to rising non-performing loan and slower economy. There are other sectors and emerging industries that have **potential to grow** and worth paying attention and research, for example:-

- Furniture
- Renewable energies
- E – commerce
- E – learning
- Automation
- 5G
- Digitization
- Cyber security
- Electric car
- Software
- Selective commodities



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