

VIETNAM INVESTMENT FORUM 2014

THE
RISE

OF FRONTIER & EMERGING MARKETS
AND OPPORTUNITIES
FOR **VIETNAM?**

MARC FABER

THE TOP PROMINENT INVESTMENT STRATEGIST IN THE WORLD

HOSTED BY



JUNE 19th, 2014

WHITE PALACE CONVENTION, HCMC
194 Hoang Van Thu st., Ward 9, Phu Nhuan Dist., Ho Chi Minh City, Vietnam

LETTER FROM VIF 2014

“We live in a new world. We live in a world where the balance of power has shifted to emerging countries.”

Marc Faber, a prominent strategist in the investment world and well-known for legendary predictions, gave such point of view when talking about the role of emerging markets.

Vietnam outshines other countries for its economic and political stability and attractive investment opportunities being resulted from sheer determination to undertake comprehensive economic reforms, especially to equitize state-owned enterprises and resolve non-performing loans in the banking system, and from the process of international integration in greater strides (TPP, ASEAN+6, Vietnam-EU FTA, Vietnam-EFTA FTA, etc.)

Given such advantages, will Vietnam continue to be a destination for foreign capital?

That is also the main issue to be discussed at the Vietnam Investment Forum – VIF 2014, co-organized by Vietnam Investment Review, HVS Vietnam Securities and Asia Frontier Capital Ltd. (AFC), under the auspices of the Ministry of Planning and Investment.

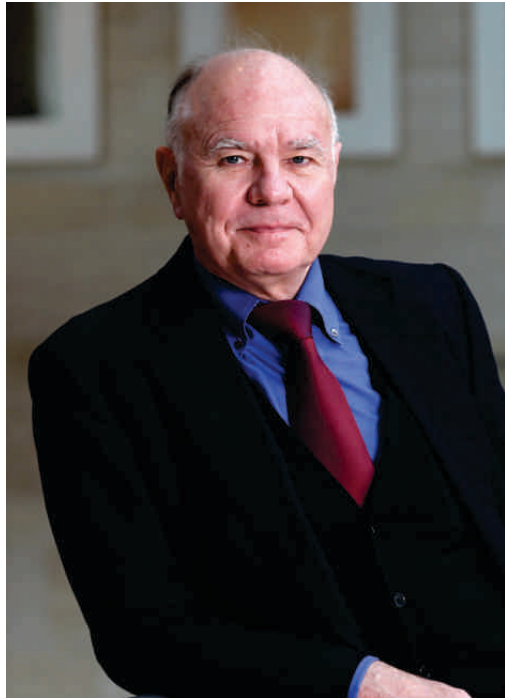
Entitled **“The rise of Frontier & Emerging markets and Opportunities for Vietnam?”**, VIF 2014 with an unparalleled agenda is designed to provide a venue for international investors and local business leaders to exchange ideas of global issues and investment opportunities, through which participants will be able to:

- Identify trends of global capital flows;
- Discover what the changing role of frontier and emerging markets means to their business;
- Define investment opportunities in Vietnam;
- Create strategic partnerships and expand network.

VIF 2014 will be held on June 19th 2014 at the White Palace Convention, HCMC. The premier event of its kind would attract at least 500 participants, most of all local business leaders and global investment funds.

Especially, VIF 2014 will feature the world's legendary investment advisor Dr. Marc Faber a keynote speaker. He would spend sufficient time sharing thoughts and exchanging ideas of and addressing the current most important topics of concern for the local business and global investment communities.

KEY-NOTE SPEAKER: DR. MARC FABER:



**"WITHOUT WORK, LIFE IS
ROTTEN, BUT WHEN WORK
IS WITHOUT A SOUL, LIFE
DIES."**

Marc Faber has earned a reputation as a contrarian investor, against the market trend with non-conformist viewpoints and alternative investment philosophies. "One does not go to see Marc Faber, Hong Kong's iconoclastic share pundit, in the expectation of good news. But after listening to him, no investor could claim he had not been warned. For Faber, a blunt-spoken Swiss, says the things nobody want to hear..." - The Sunday Times (London). For this reason, he has been called as Mr. Doom for a long time.

CAREER

Marc Faber is a Swiss investor, obtained a PhD in Economics magna cum laude at the age of 24. Between 1970 and 1978, Dr. Faber worked for White Weld & Company Limited in New York, Zurich and Hong Kong. From 1978 to February 1990, he was the Managing Director of Drexel Burnham Lambert (HK) Ltd. In June 1990, he set up his own business, MARC FABER LIMITED which acts as an investment advisor and fund manager.

Dr. Faber publishes a widely read monthly investment newsletter "The Gloom Boom & Doom Report" which highlights unusual investment opportunities. Besides, he is the author of several books including "Tomorrow's Gold - Asia's Age of Discovery" which was first published in 2002 and highlights future investment opportunities around the world and is being translated into Japanese, Chinese, Korean, Thai and German. A book on Dr. Faber, "Riding the Millennial Storm" by Nuri Vittachi, was published in 1998. Dr. Faber is also a regular speaker at various investment seminars and making numerous of appearances on TVs around the world like CNBC, Bloomberg... Dr. Faber is now associated with a variety of funds and is a member of the Board of Directors of numerous companies.

He is also the chairman of Indochina Capital and Dragon Capital-managed Vietnam Growth Fund and a shareholder of Asia Frontier Capital Fund, all of these now have significant investments in Vietnam.

KEY-NOTE SPEAKER: DR. MARC FABER:



“WHEN YOU PRINT MONEY, THE MONEY DOES NOT FLOW EVENLY INTO THE ECONOMIC SYSTEM. IT STAYS ESSENTIALLY IN THE FINANCIAL SERVICE INDUSTRY AND AMONG PEOPLE THAT HAVE ACCESS TO THESE FUNDS, MOSTLY WELL-TO-DO PEOPLE. IT DOES NOT GO TO THE WORKER.”

HISTORICAL PREDICTIONS:

Since 1980s, Dr. Faber has made various predictions seemingly eccentric but accurate, particularly in 1987 he warned his clients to cash out a week before Black Monday on Wall Street. He made them handsome profits by forecasting the burst in the Japanese Bubble in 1990. He correctly predicted the collapse in US gaming stocks in 1993; and he foresaw the Asia-Pacific financial crisis of 1997/98 and the resulting global volatility. From 2012, Dr. Faber has often mentioned Vietnam in his predictions. He defines Vietnamese stocks one of the best longs for 2014. His three bold predictions for 2014 are:

- The market will continue to decline from its November high of 1,813
- Best shorts for 2014: Facebook, Tesla, Twitter, Netflix, and Veeva Systems
- Best longs for 2014: Gold, gold shares, and Vietnamese stocks.

500 - 700 PARTICIPANTS

VIF 2014 would be the premier gathering for the who's who of leaders and experts from:

- The Ministry of Planning and Investment (MPI), the Ministry of Finance (MoF), the State Bank of Vietnam (SBV), the State Securities Commission (SSC) and Stock Exchanges;
- International and local fund, insurance and asset management communities;
- Securities firms;
- Listed companies;
- Commercial banks and other financial institutions;
- Foreign and Vietnamese business associations;
- Wealthy individuals who looking for investment opportunities and better portfolio management
- Academies and institutes of economics
- Others

10 REASONS FOR YOUR ATTENDANCE

COMMON BENEFITS

1. LEARN HOW GLOBAL BUBBLES WERE CREATED AND PREDICT WHEN THEY WILL BURST
2. DISCOVER WHAT THE BALANCE OF POWER SHIFTING FROM DEVELOPED MARKETS TO FRONTIER & EMERGING MARKETS MEANS TO THE BUSINESS AND ASSET MANAGEMENT COMMUNITIES
3. NETWORK WITH POTENTIAL PARTNERS.

INVESTORS:

4. Learn about the unique processes used by successful investors & Network with other experienced and savvy investors
5. Better understand the emerging opportunities and challenges in the context of the post-crisis investment landscape
6. Learn what actions to take to minimize risks and what opportunities to capitalize to maximize earnings
7. Great access to Vietnamese companies

BUSINESSES:

8. Capitalize the changing global capital flows to improve financial positions
9. Learn about investor appetites and adopt suitable approaches to attract foreign funds
10. Meet investors around the world & promote investment opportunities to global investors

MEDIA PLAN

Key media channels:

Leading business publications:

Dau Tu, Dau Tu Chung Khoan, Forbes Vietnam
Nhip Cau Dau Tu, Thoi bao kinh te Sai Gon, Doanh Nhan Sai Gon

Mass media:

Thanh Nien, Tuoi Tre

English publications:

Vietnam Investment Review, Vietnam News, Saigon Times.

TV channels:

VTV1, VITV, InfoTV, FBNC, HTV

International media channels:

Bloomberg, Reuters

Online portals:

Baodautu.vn; VnEconomy.vn; Tinnhanhchungkhoan.vn; CafeF.vn
Vietstock.vn; NDHMoney.vn; Vir.com.vn

Social networks:

Facebook, LinkedIn, Twitter

Press Conference

May 8th, 2014

HCMC

TIME & VENUE

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AGENDA

MORNING SESSION

8:00- 8:30

Registration & Coffee

8:30- 9:00

Welcoming Address

Representative of Ministry of Planning & Investment

Opening Remarks

Dr. Nguyen Anh Tuan, Editor – in – chief, VIR

9:00- 10:00

Have we entered the terminal phase of A gigantic global credit and asset bubble?

Dr. Marc Faber

- What is the global economy outlook?
- Where and how were global bubbles created? When will they possibly burst? What will be possible impacts?
- Does it mean the balance of power is shifting to frontier and merging markets?
- Which are the potentials to invest in? What are opportunities for Vietnam?

10:00- 10:30

Q&A (Marc Faber in charge)

10:30- 11:00

Networking Break

11:00- 11:30

Investment Strategy in the Asian Frontier Markets & in Vietnam

Thomas Hugger, CEO, Asia Frontier Capital (AFC)

- While developed markets are facing the risk of crisis and collapse, the Asian markets, especially frontier markets, draw special attention.
- Opportunity for those who understand the rules of market operation, since at the time frontier and emerging markets in Asia are rapidly forming conditions for spectacular growth, on receiving the shift of the balance of power from the developed.
- Characteristics of frontier and emerging markets, and Vietnam's in particular, sharing perspectives and investment strategies in frontier & emerging markets.

11:30- 13:30

Networking Lunch

AGENDA

AFTERNOON SESSION

13:30- 14:00

Will Vietnam be a destination of foreign capital flows?

Don Lam, CEO of VinaCapital Group

14:00- 15:30

Panel Discussion

Topic "The rise of frontier & emerging markets and opportunities for Vietnam?"

Moderator: Andy Ho Managing Director, Head of Investment, VinaCapital Group

Panelist

Dr. Marc Faber

Mr. Andreas Vogelsanger, CEO, Asia Frontier Capital (Vietnam) Ltd. (AFC)

Dr. Vu Bang, SSC Chairman, State Securities Commission (SSC)

Dr. Pham Viet Muon, Deputy Head of the Steering Committee for Enterprise Reform and Development (or Mr. Nguyen Chi Thanh, Portfolio Manager, SCIC) - *proposed*

Mr. Tran Nguyen, CEO, Nam Long (or Ms. Nguyen Thi Mai Thanh, President, REE

Ms. Duong Mai Hoa, CEO, Vingroup/Mr. Le Phuoc Vu, Chairman, Hoa Sen Group) - *proposed*

15:30 – 17:30

Business Matching – open program



Marc Faber
Publisher of GloomBoom&Doom Report,
Investment Advisor of MARC FABER LIMITED



Thomas Hugger
CEO & Fund Manager of
Asia Frontier Capital Limited



Don Lam,
CEO of VinaCapital Group

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