

Opportunities of the Equity Market in China – Integrating the Reliability of the Bond Market

Chinese equities and bonds are becoming integral parts of the major global indices and are finding their way into investor's portfolios. We believe it make sense to combine these two asset classes in a unique portfolio to enhance the chances of superior risk-adjusted returns.

For years, we have relied on multi-asset funds capitalising on the diversification benefits provided by bonds to act as a ballast to the volatility in equities. Nowadays, however, this successful formula is challenged by the negative interest rate environment in the developed countries and a lack of safe haven assets. This is not so for China, where investors can still profit from a positive-yielding bond market that still exhibit safe haven characteristics and an equity market full of opportunities commensurate with China's vibrant economy.

Eurizon is bringing together its Chinese market knowledge integrating the Chinese onshore bond market with the attractive Chinese A-share market to offer a flexible Chinese Multi-Asset fund.

Stephen Jen will highlight the advantage of this newly launched portfolio and elaborate on the purpose of this investment idea.



Stephen Li Jen

From 1996-2009, Stephen was MD at Morgan Stanley and held various roles, including Global Head of Currency Research and Chief Global FX and EM Strategist. Prior to this Stephen was an economist with the IMF in Washington, D.C. covering Eastern Europe and Asia economies, and was actively involved in the design of the IMF's framework to provide debt relief to highly indebted countries. Stephen holds a PhD in Economics from the Massachusetts Institute of Technology with concentrations in International and Monetary Economics and earned a BSc in Electrical Engineering (summa cum laude) from the University of California, Irvine.

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