

KHAZANAH MEGATRENDS FORUM 2018

ON BALANCE

RECALIBRATING MARKETS, FIRMS, SOCIETY & PEOPLE

SPECIAL SESSION:

ACTIVE v.s. PASSIVE - THE PARADOX OF LONG TERM CAPITAL.

ONLY 22% OF BOARDMEMBERS KNOW HOW THEIR COMPANIES CREATE VALUE



THERE'S GOOD CHOLESTEROL & BAD CHOLESTEROL:

MALAYSIA NEEDS MORE PRIVATE EQUITY & ACTIVISTS,

BUT YOU NEED ACTIVISTS THAT AREN'T DAMAGING WHILE STILL EXERTING PRESSURE.

everyone is an 'active' investor... you always make a decision of what you do with your money!



WE NEED TO COMBINE THE HUMAN MINDSET with DATA AND INNOVATION!

TECHNOLOGY IS HAVING A profound IMPACT ON EVERY INDUSTRY

DON'T THINK 'INVESTING' IS ANY DIFFERENT

WE NEED TO FOCUS CAPITAL IN THE

LONG TERM



THE SWEET SPOT for a SUCCESSFUL COMPANY SEEMS TO BE THE 'LARGE MINORITY SHAREHOLDER' - AN OWNERSHIP OF 25% - 30%