

Complementary Boutiques Spring Event 2025

Invitation to join Amati Global Investors, Oldfield Partners and J Stern & Co for what will be an interesting set of presentations from three very different yet complementary propositions

For Financial Intermediaries Only



Mikhail Zverev



Graeme Bencke

WS Amati Global Innovation Fund, Mikhail Zverev and Graeme Bencke, will share their views on the “innovation frontiers” that will provide the next leg of global growth. They invest in innovation with broadening adoption and profitable business models. In short, they invest in real businesses, not science projects.

Oldfield Partners is an independent value manager that provide clients with concentrated 20-35 stock portfolios. They manage six equity strategies, each one following the same concentrated yet diversified and unconstrained approach. Oldfield Partners will be presenting the **Global All Cap Value Strategy** with portfolio manager Sam Ziff. Sam will talk through the current portfolio, why now is the time to allocate to value and the case for active management in the current environment.



Oldfield Partners



Sam Ziff

J. STERN & Co.



Charles Gelinet



Jean-Yves Chereau

J Stern's **Emerging Market Debt Stars Fund** seeks to preserve and create wealth by investing in a portfolio of quality emerging market businesses with the specific investment objective to:

- Generate attractive total returns from income and capital growth over the medium term.
- Maintain low overall volatility.
- Provide diversification from other major asset classes (particularly developed market equities and fixed income).

Venue: Amati Global Investors, 8 Coates Crescent Edinburgh EH3 7AL

When: Tuesday 20 May 2025

Arrive: 3.45pm with presentations starting at 4.00pm.

Finish: Presentations will conclude at 5.30pm however there will be the opportunity to network following the session with **wine & cheese** and other refreshments offered

Places are limited. (RSVP: info@amatiglobal.com or call 0131 503 9115)

