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The Case for Investment in New Emerging Markets—Africa and the Middle East

Recorded at a CFA Ireland event

In this webcast, Daniel Broby, FSIP, discusses the following:

- Africa is enjoying growth in GDP at a time when the rest of the world is in recession. We are seeing generational change and the industrialization of a continent previously written off.
- Capital markets are opening up and alpha opportunities abound.
- The African diaspora is returning; better educated and with a new mindset. Risk is misperceived and market pricing remains inefficient (a stock-pickers paradise).
- The role technology is playing in addressing the weaknesses in infrastructure.

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SPEAKER



Daniel Broby, FSIP, is chief investment officer of Silk Invest. He runs a team based in London, Egypt, South Africa, and Morocco. He joined Silk Invest having sold the hedge fund he founded (Danfonds Frontier Markets SPC) to the company. Prior to that he worked for Renaissance Investment Management (UK), where he was chief executive officer. He held various roles and responsibilities throughout the RIM group, principally those of chief investment officer, head of asset management, and director of the Renaissance Africa Fund.

Prior to RIM, Daniel was a member of the BankInvest Investment Board and joint manager of BankInvest Basis, a flagship global product. He joined Bankinvest as chief investment officer in 2000. Daniel joined the fund management industry at the end of 1985 as a trainee at Credit Suisse Buckmaster and Moore. Prior to his role at BankInvest, he was chief portfolio manager at Nordea Investment Management and prior to that head of international research at Morgan Stanley Quilter.

Daniel has an MPhil in economics and an MSc in investment analysis. He was a board member of CFA UK for over 10 years. He was the CFA Institute President Council Representative for Europe, Middle East, and Africa for four years and was presented with the CFA Institute Society Leader Award in 2006.

He now serves as a member of the Capital Markets Policy Council. He was elected an individual member of the London Stock Exchange in 1990 and is a Fellow of the Securities Institute, a member of CFA UK, and a Visiting Fellow at Durham University.

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