

# VIGILSHORE™

## VIGILSHORE Investment Strategy

### *Objective:*

The primary goal of the VIGILSHORE Investment Strategy is to foster growth, capital appreciation, and income generation by investing in a balanced and diversified portfolio. The strategy will focus on sustainable returns through a medium to low-risk approach, adjusting based on financial, legal, and governance considerations.

### *Time Horizon:*

VIGILSHORE aims for a multi-horizon approach, addressing both short-term (1-3 years) and long-term (7+ years) goals. Investments will be managed with flexibility, catering to varying timeframes for growth and capital preservation.

### *Risk Tolerance:*

The strategy operates with a medium to low-risk profile, with additional focus on mitigating financial, legal, and governance risks. The level of risk tolerance will adjust based on the project's stage and market conditions, ensuring balanced risk exposure across the portfolio.

### *Asset Allocation:*

VIGILSHORE will primarily focus on equities, selecting companies with strong growth prospects in key sectors, including:

- Finance

- Technology
- Energy and Extractive Industries
- Transport

While maintaining a primary focus on liquid equity investments, there will also be room for illiquid assets when necessary to maximize long-term value and capitalize on niche opportunities.

*Geographical Focus:*

The investment strategy will span across key regions with growth potential:

- Europe
- Australia
- United States

This regional focus ensures geographical diversification, tapping into global markets while considering local economic trends and policies.

*Sector Priorities:*

Key sectors for investment include:

- Finance
- Technology
- Energy
- Extractive Industries
- Transport

These sectors have been selected due to their potential for high returns, future growth, and alignment with global economic trends.

*Liquidity Preferences:*

The strategy will allow for a blend of highly liquid and illiquid investments. While maintaining a base of liquid assets, investments in less liquid markets will be included for long-term capital appreciation and diversification.

### *Financial Metrics:*

Investments will be evaluated based on:

- Return on Equity (ROE)
- Earnings growth

These metrics will be used to assess the financial health and growth potential of target companies, ensuring that all investments meet VIGILSHORE's stringent performance criteria.

### *Risk Management Approach:*

As a risk management firm, VIGILSHORE employs its own comprehensive risk management framework to identify, assess, and mitigate risks at every stage of the investment process. This includes diversification strategies, legal reviews, and close attention to governance and market risks.

AUTHORISED BY VIGILSHORE CORPORATE STANDARD

### *Rebalancing Strategy:*

The portfolio will be rebalanced following every new venture and periodic audits to ensure the strategy remains aligned with VIGILSHORE's objectives. Rebalancing will also occur based on market conditions and new investment opportunities.

### *Performance Measurement:*

VIGILSHORE's success will be evaluated based on the following:

- Targeted returns
- Team and career demand
- Market demand
- Government or investor backing

These indicators will help assess the strategy's overall effectiveness and its alignment with both market opportunities and investor expectations.