



FINANCIAL ADVISORY

CDH Asset Management Limited (CDH AM) continues to develop expertise in the various financial services offered, and this time around, it's in financial advisory. This newsletter presents the fundamentals of financial advisory while highlighting the specific financial advisory services offered.

Financial advisory 101

Financial advisory service is a professional solution given to individuals and companies on financial matters that may arise from changes in the marketplace or in financial objectives, such as investments, financing, divesture, savings, and retirement planning, just to mention but a few. While greatly perceived as a consultation service, the financial advisory process involves problem and goal identification, data organization and analysis, recommendation, and most importantly, plan implementation and monitoring. Because many organizations and individuals lack the expertise to perform this process to be able to provide their own solutions, financial advisory services are structured to address this problem.

CDH AM financial advisory services

When offered by such experts as CDH AM, financial advisory becomes a success story not only for CDH AM, but also for the client; the benefits are massive and mutual. The CDH AM experts get to professionally practise what they are trained to do best, while the clients enjoy their financial freedom. In this regard, CDH AM specifically offers the following services:-

Financial planning- In line with clients' financial goals, CDH AM systematically allocates financial resources on their behalf in such areas as savings, retirement planning, tax planning, and wealth distribution.

Treasury outsourcing- CDH AM manages treasury activities on behalf of clients to enable them concentrate on their core business functions.

Financial restructuring – CDH AM directs corporate clients to restructure their financial position to improve efficiency. This may involve balance sheet reorganization, downsizing, new business unit establishments, recapitalisation, and debt rescheduling.

Capital re-organisation- CDH AM directs clients in adjusting capital composition to meet specific financial objectives.

Debt and equity financing- CDH AM provides leadership to corporate clients through the process of raising debt or equity capital through private and public placements

Tax planning – CDH AM employs a systematic approach to analyze differing tax options aimed at minimising tax liabilities in current and future tax periods.

MARKET STATISTICS

Treasury Bill Yields table with columns: Tenor Days, Current %, Previous %

CDH Investment Rates table with columns: Tenor/Period, Rate %

Inflation Rates table with columns: Sept.09, Oct.09

Middle Exchange Rates table with columns: 22.10.09, 27.10.09

Stock Exchange table with columns: Index, Current Points, Previous Points

Nominal Treasury bill stock table with columns: June.09, July.09, Aug.09

African proverb: "Tomorrow belongs to those who prepare for it today."

Consult CDH: diversity in financial solutions