



KEDEM CAPITAL MANAGEMENT



# KEDEM CAPITAL MANAGEMENT

## Driving Sustainable Asset Growth Through Professional Research



In the context of the continuous evolution of global capital markets, professional research and rational investment principles are becoming the core foundation for the long-term development of the asset management industry. Since its inception, Kedem Capital Management has always adhered to a long-term value orientation, providing investors with more professional and reliable asset management services through systematic research, sound asset allocation, and continuous financial technology innovation.

This white paper aims to introduce the company's development background, investment philosophy, core businesses, and future strategic direction, showcasing Kedem Capital Management's professional principles and long-term vision in the global asset management field, and exploring sustainable value and long-term opportunities in the capital market together with investors.



Kedem Capital Management

**DRIVING SUSTAINABLE ASSET GROWTH THROUGH PROFESSIONAL RESEARCH**

# COMPANY OVERVIEW



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Founded in 2019 and headquartered in Colorado, USA, Kedem Capital Management is a professional institution specializing in global capital market investment and asset management. The company is committed to providing global investors with stable and sustainable asset management services through systematic research and a long-term investment philosophy.

Since its inception, Kedem Capital Management has gradually established a research-driven development model, adhering to rational analysis and a long-term perspective in a complex and volatile market environment, forming an investment management system with professional depth and a global vision.

In terms of business scope, Kedem Capital Management's core businesses cover multiple areas including global equity investment, fund management, ETF asset allocation, IPO opportunity research, and AI quantitative investment. Through a diversified investment structure and research system, the company provides professional asset management services to different types of investors. Its clients include individual investors and institutional clients, and it is committed to providing clients with more stable, long-term, and forward-looking investment solutions in the global capital market.





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# COMPANY DEVELOPMENT BACKGROUND

## Kedem Capital Management

With the continuous development of the global economy and financial markets, capital markets have gradually formed a highly globalized and diversified landscape. Cross-regional capital flows are increasing, and technological innovation and industrial upgrading are continuously driving new investment opportunities. Against this backdrop, investors not only need a broader global perspective but also more professional and systematic research capabilities to identify long-term value in the market.

Meanwhile, the asset management industry is also undergoing continuous structural changes. Investment decisions are gradually shifting from traditional experience-based models to data-driven and research-driven professional systems. Investment institutions are placing greater emphasis on multi-dimensional information such as macroeconomic analysis, industry research, and fundamental assessment of companies. Simultaneously, the development of fintech has led to the integration of technologies such as artificial intelligence and big data analytics into the investment research process, improving market analysis efficiency and driving the continuous upgrading of asset management models.



It is against this backdrop that Kedem Capital Management was officially established in 2019. The company aims to build a more robust and long-term investment management system for investors by integrating professional research capabilities, a global investment perspective, and fintech innovation. Through continuously deepening its research capabilities and investment management experience, Kedem Capital Management is committed to establishing a professional institution with a long-term value orientation in the global asset management industry.

# MISSION AND VISION



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## MISSION

With the continuous development of the global economy and financial markets, capital markets have gradually formed a highly globalized and diversified landscape. Cross-regional capital flows are increasing, and technological innovation and industrial upgrading are continuously driving new investment opportunities. Against this backdrop, investors not only need a broader global perspective but also more professional and systematic research capabilities to identify long-term value in the market.

## VISION

Kedem Capital Management's vision is to establish an internationally influential asset management institution. The company aims to continuously advance the investment management industry by deepening its research capabilities, improving its investment management level, and promoting the application of financial technology. By integrating a global investment perspective with a professional research system, the company is committed to providing investors with more scientific, rational, and forward-looking asset management services.

## DEVELOPMENT PHILOSOPHY

In its long-term development, Kedem Capital Management adheres to professional research as its core driving force, sound investment as its fundamental principle, and continuously improves its investment management capabilities through technological innovation. The company believes that only through rational research and a long-term value orientation can it achieve sustainable development in the global capital market and create stable and long-term value for investors.





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# INVESTMENT PHILOSOPHY

Kedem Capital Management's investment philosophy is built upon long-term research and rational analysis. The company believes that short-term fluctuations in capital markets are often influenced by sentiment and market conditions, while truly sustainable investment opportunities typically stem from a deep understanding of macroeconomic trends, industry structure, and corporate growth potential. Therefore, the company consistently observes the market from a long-term perspective, constructing its investment portfolio through systematic research and robust strategies.

## LONG-TERM VALUE ORIENTATION

The company adheres to a long-term value-oriented investment principle, seeking investment opportunities with sustainable competitiveness and long-term growth potential through in-depth research into corporate growth potential and industry development trends.

## SOUND ASSET ALLOCATION

In asset management, the company emphasizes diversified allocation and portfolio management, maintaining relative stability in its asset structure across different market environments by reasonably diversifying investment risks.

## RATIONAL RESEARCH-DRIVEN

Investment decisions are based on systematic research. Through macroeconomic analysis, industry research, and fundamental corporate assessment, the company has developed a multi-dimensional research framework to enhance the scientific rigor and stability of its investment judgments.

## RISK MANAGEMENT FIRST

Risk management is a crucial component of investment management. The company continuously monitors market changes and portfolio structure to achieve long-term asset growth while controlling risk.



# INVESTMENT RESEARCH FRAMEWORK



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Kedem Capital Management has established a systematic investment research framework, providing support for investment decisions through multi-dimensional research methods. The company believes that changes in the capital market are often influenced by a combination of macroeconomic factors, industry development, and the company's own internal factors; therefore, investment research needs to be analyzed from multiple levels. By constructing a complete research framework, the company can more comprehensively understand investment opportunities and potential risks in a complex market environment.



## MACROECONOMIC RESEARCH

By analyzing the global economic environment, policy changes, and financial market trends, the company can better understand the impact of macroeconomic factors on the capital market, providing important references for asset allocation.

## INDUSTRY STRUCTURE RESEARCH

Industry development trends are an important foundation for corporate growth. The company identifies industry sectors with long-term growth potential through research on industrial structure, technological development, and market competition.

## MARKET DATA ANALYSIS

In the investment research process, the company also analyzes market data and historical information to more comprehensively understand market changes, thereby improving the depth and accuracy of investment research.

## COMPANY FUNDAMENTAL ANALYSIS

Company fundamentals are an important basis for long-term investment. The research team assesses a company's future growth potential by analyzing its business model, financial condition, and competitive advantages.



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# AI QUANTITATIVE INVESTMENT TECHNOLOGY

With the continuous development of fintech, artificial intelligence and data analytics are gradually becoming important tools in modern asset management. By combining technological means with investment research, investment institutions can identify market changes in a broader information environment and improve research efficiency and analytical depth. The application of AI technology not only makes investment research more systematic but also makes the investment decision-making process more scientific and rational.



Kedem Capital Management has gradually introduced artificial intelligence and data analytics into its investment research process, improving market research capabilities and asset allocation efficiency by establishing quantitative research models and data analysis frameworks. Through the combination of technology and research systems, the company can more effectively analyze market information in complex market environments and provide more comprehensive research support for investment decisions.

- **AI QUANTITATIVE MODELS**

The company systematically analyzes market data by building quantitative investment models, thereby identifying potential market trends and investment opportunities in a broader information environment.

- **DATA ANALYTICS CAPABILITIES**

Through big data analytics technology, the company can integrate information and data from different markets, conduct research from multiple dimensions, and improve the efficiency and accuracy of market analysis.

- **INVESTMENT RESEARCH SUPPORT SYSTEM**

Intelligent research tools provide investment teams with more comprehensive data references and research support, helping to improve the depth of investment research and optimize asset allocation strategies.

# GLOBAL EQUITY INVESTMENT BUSINESS



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Kedem Capital Management has established a systematic research framework in the global equity investment field. The company conducts in-depth research on the operating models and industry positions of global listed companies, combined with macroeconomic and industry development trends, to continuously track and analyze companies with long-term growth potential. Through rational research and a long-term perspective, the company is committed to finding investment opportunities with sustainable value in the global capital market.

- **GLOBAL CORPORATE RESEARCH**

The company continuously focuses on high-quality companies in major global capital markets, assessing their long-term growth potential through systematic research on their operating models and competitive advantages.

- **INDUSTRY TREND JUDGMENT**

Through research on industry development trends and technological innovation directions, the company can identify industry sectors with long-term growth potential.

- **LONG-TERM VALUE INVESTING**

The company adheres to a long-term value orientation, seeking investment targets that can maintain steady growth over long periods through in-depth research on corporate fundamentals.



In the global capital market, equity investment has always been a crucial component of asset management. With the development of economic globalization, companies in different countries and regions are constantly driving industrial innovation and technological progress, providing investors with abundant investment opportunities. Through continuous research on global capital markets, investment institutions can gain a more comprehensive understanding of corporate growth potential and long-term industry trends.



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# ETF ASSET ALLOCATION STRATEGY



## ASSET DIVERSIFICATION

ETFs typically cover multiple industry or market indices. By diversifying investment targets, the volatility risk from a single asset can be reduced to some extent, thereby improving the overall stability of the investment portfolio.



## INVESTMENT EFFICIENCY

ETFs are characterized by convenient trading and relatively low costs, enabling investors to participate more efficiently in investment opportunities across different markets or industries.



## PORTFOLIO FLEXIBILITY

Through the combination of different types of ETF products, investment institutions can flexibly adjust according to changes in the market environment, thereby optimizing asset structure and improving long-term investment performance.

In the modern asset management system, ETFs (Exchange Traded Funds) have become an important investment tool. ETFs not only offer high liquidity and transparency but also provide more flexible asset allocation options for investment portfolios. By rationally utilizing ETF products, investment institutions can achieve a more stable and diversified investment structure in different market environments, thereby improving the stability and efficiency of the overall investment portfolio.

# FUND MANAGEMENT BUSINESS



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Fund management is a crucial component of Kedem Capital Management's asset management system. Through a professional research team and systematic investment methods, the company provides investors with structured, long-term-oriented fund management services. Based on long-term value investing, the fund management business constructs stable and growth-potential investment portfolios through comprehensive analysis of the macroeconomic environment, industry trends, and corporate fundamentals, thereby providing investors with more professional and robust asset management solutions.



In the investment management process, Kedem Capital Management emphasizes the combination of portfolio management and multi-strategy fund structures. The company optimizes its portfolio structure by rationally allocating different asset classes and investment directions to improve overall asset allocation efficiency. Simultaneously, through continuous research and dynamic portfolio adjustments, the company is committed to maintaining a steady investment pace in different market environments and achieving sustained asset growth over the long term.



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## Kedem Capital Management

In the global capital market, Initial Public Offerings (IPOs) provide investors with a significant opportunity to participate in the growth of emerging companies. With the continuous advancement of technological innovation and industrial upgrading, more and more companies with innovative capabilities and growth potential are entering the capital market. Through systematic research on IPO companies, investment institutions can identify companies with long-term development potential earlier and seize potential investment opportunities during the company's growth process.



Kedem Capital Management has established a systematic research methodology for IPO opportunity research. The research team continuously tracks and evaluates companies planning to go public through in-depth analysis of industry development trends, business models, and market competition, thereby identifying investment opportunities with long-term growth potential. Through rational research and a long-term perspective, the company is committed to providing investors with more forward-looking investment references.

# IPO OPPORTUNITY RESEARCH

## INDUSTRY TREND RESEARCH

By analyzing industry development directions, technological innovation, and changes in market demand, the company can identify industry sectors with long-term growth potential.

## COMPANY GROWTH POTENTIAL ASSESSMENT

The research team conducts a comprehensive assessment of a company's future development potential by analyzing its business model, financial condition, and competitive advantages.

## IDENTIFICATION OF LONG-TERM INVESTMENT OPPORTUNITIES

In the research process, the company focuses more on the development potential of enterprises in the long term, thereby identifying investment opportunities with sustainable value.

# RISK MANAGEMENT SYSTEM



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In asset management, risk management is a crucial foundation for ensuring investment stability. Capital markets are influenced by various factors, including macroeconomic conditions, policy changes, and market sentiment. Therefore, establishing a systematic risk management mechanism is essential for long-term asset management. Kedem Capital Management consistently prioritizes risk management in its investment management process, ensuring the stability of its asset management strategies across different market environments through continuous monitoring of market changes and portfolio structure.



- **RISK ASSESSMENT**

Before making investment decisions, the company conducts systematic research to assess the risks of potential investment targets, comprehensively analyzing the macroeconomic environment, industry trends, and corporate fundamentals to fully understand investment risks.

- **ASSET ALLOCATION CONTROL**

By rationally allocating different asset classes and investment directions, the company can diversify risks to a certain extent, thereby improving portfolio stability.

- **MARKET VOLATILITY MONITORING**

The research team continuously monitors changes in global capital markets, adjusting portfolio structure promptly through analysis of market volatility and the macroeconomic environment.



- **LONG-TERM RISK MANAGEMENT**

The company has established a long-term risk monitoring system, ensuring the stable and sustainable development of its investment strategies over the long term through continuous research and dynamic evaluation.



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# CLIENT SERVICE AND PARTNERSHIP PHILOSOPHY

In the asset management industry, client relationships are more than just fund management; they are long-term partnerships based on trust and responsibility. Kedem Capital Management firmly believes that sound asset management is built on professional research and transparent communication. Through continuous research sharing and information exchange, the company aims to help investors better understand capital market trends and maintain a rational and long-term perspective in a complex and volatile market environment.



Kedem Capital Management is committed to building long-term and stable partnerships with its clients. The company emphasizes continuous communication and professional support throughout its service process, providing clients with clearer investment guidance through research reports, market analysis, and investment perspectives. Through long-term cooperation and mutual growth, the company hopes to share value with its clients in the development of the capital market.

## TRANSPARENT COMMUNICATION

The company highly values information transparency. Through continuous information exchange and research sharing, clients can more clearly understand market changes and investment strategies.

## PROFESSIONAL ADVICE

Relying on its research team and systematic research framework, the company provides clients with professional market analysis and investment advice, helping them better understand investment opportunities and market trends.

## LONG-TERM COOPERATION

The company adheres to the principle of long-term cooperation, establishing stable and sustainable partnerships with clients through sound asset management and continuous research support.

# INTERNATIONAL COOPERATION AND ACADEMIC SUPPORT



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Against the backdrop of the continuous development of global fintech, collaboration between research institutions and investment firms is increasingly becoming a key driver of innovation in investment management. While continuously deepening its investment research capabilities, Kedem Capital Management actively collaborates with international research institutions to promote the development of fintech and quantitative investment research. In 2021, the company established a strategic partnership with Axiom Quantitative Academy, engaging in in-depth cooperation in areas such as quantitative investment research, fintech innovation, and investment education.

Within this framework, Kedem Capital Management has established a long-term research collaboration with Professor William Vu, Head of Axiom Quantitative Academy. Through the combination of academic research and market practice, both parties are jointly exploring the application of artificial intelligence and quantitative investment technologies in asset management. This collaboration not only further enhances the company's research capabilities but also provides investors with more cutting-edge financial knowledge and research perspectives.





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# CORPORATE SOCIAL RESPONSIBILITY

While driving the development of its financial business, Kedem Capital Management has always attached great importance to corporate social responsibility. The company believes that financial institutions should not only create economic value through professional services but also actively participate in social welfare undertakings, contributing to social development and community building. Through continuous implementation of public welfare projects and social support actions, the company hopes to create a more long-term and positive impact on society while achieving its own development.

## COMMUNITY DEVELOPMENT

Kedem Capital Management actively participates in community support projects, promoting community development and social care through resource investment and public welfare activities.

## EDUCATION SUPPORT

The company continuously focuses on education development and supports the construction of educational resources through public welfare projects, hoping to provide more students with learning opportunities and growth environments.

## PHILANTHROPY

The company allocates 5% of its annual revenue to support charitable and social welfare undertakings each year, including social welfare projects and public service support, fulfilling its corporate social responsibility through concrete actions.



# GLOBAL BUSINESS DEVELOPMENT STRATEGY



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With the continuous development of global capital markets, Kedem Capital Management is gradually advancing its global business layout, providing investors with more professional and diversified asset management services by deepening its international research capabilities and regional cooperation. In building its global investment system, the company continuously focuses on the economic structures and capital market characteristics of different regions, and expands new development space through research and cooperation. By establishing a cross-regional research network and cooperation system, the company hopes to continuously enhance its asset management capabilities and investment research depth globally.



In its global development strategy, the Asia-Pacific region is gradually becoming an important financial and investment center. With regional economic growth and capital market development, the Asia-Pacific market's position in global asset allocation is constantly rising. Kedem Capital Management plans to further strengthen its research and cooperation in the Asia-Pacific market in the future, providing local investors with more professional asset management services through regional market layout.



## MALAYSIA

As one of the important financial markets in Southeast Asia, Malaysia has a good foundation for development in regional capital flows and financial innovation. The company plans to gradually expand its regional business by strengthening local market research and cooperation.

## SINGAPORE

As an international financial center, Singapore holds an important position in the global capital market. By deepening its cooperation with local financial institutions and research institutions, the company hopes to further enhance its investment research capabilities and business development in the Asia-Pacific region.





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# FUTURE DEVELOPMENT PLAN



Amidst the ongoing changes in the global financial market, Kedem Capital Management will continue to adhere to its research-driven and long-term value-oriented development philosophy. The company's future development will focus on investment research capabilities, financial technology applications, and global business expansion. By continuously improving its professional capabilities and technological level, it aims to provide investors with more robust and long-term asset management services. Through continuous innovation and international cooperation, the company is committed to establishing itself as a professional institution with long-term influence in the global asset management industry.



## AI QUANTITATIVE INVESTMENT UPGRADE

The company will continue to optimize its artificial intelligence and quantitative research system, improving market research efficiency through data analysis and intelligent models, and further refining its investment research framework.



## ETF INVESTMENT RESEARCH DEEPENING

By strengthening ETF investment strategy research, the company will continuously optimize its asset allocation methods to enhance the stability and long-term growth potential of its investment portfolio.



## IPO OPPORTUNITY EXPANSION

The company will continue to monitor the development trends of emerging companies globally, identifying companies with growth potential through systematic research and providing investors with a forward-looking investment perspective.



## GLOBAL BUSINESS EXPANSION

In the future, the company will gradually strengthen international market research and regional cooperation, expand its global business network, provide investors with more comprehensive asset management services, and further enhance the company's international influence.



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# LOOKING TOWARDS THE LONG-TERM FUTURE OF GLOBAL CAPITAL MARKETS

## Driving Value Through Research, Creating Long-Term Growth Through Professionalism

Against the backdrop of continuous development in the global economy and capital markets, the investment environment is constantly changing. Faced with a complex and volatile market structure, professional research, rational judgment, and a long-term perspective will become crucial foundations for the sustainable development of the asset management industry.

Kedem Capital Management will continue to adhere to prudent investment principles, providing investors with more professional and reliable asset management services through systematic research, technological innovation, and a global vision. In the future, the company will continue to deepen its investment research capabilities, expand its international cooperation network, and explore new development opportunities in the global capital markets, working together with investors towards more stable and long-term value growth.