

I think it is a relatively safe bet rmb will rise 5/7% per annum vs. USD.

I am thinking well leased office building and shopping mall.

沈栋

Desmond Shum

在 2011-9-17, 9:44, "Jeffrey Epstein"

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currency risk? businesses are too complicated, leveraged securitties seem to make more sense

2011/9/16 Desmond shum

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With US interest rate at such low level and in a sustained way. How to do a carry trade - borrow in US and invest in China? Buy a leveragable business?

China is in for a period of credit squeeze. There are stable yield asset for purchase. I thought this is an interesting opportunity.

Your thought?

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Desmond Shum

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