

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" <jeevacation@gmail.com> 写道 :

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

2011/9/16 Desmond shum <[REDACTED]>

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?

沈栋
Desmond Shum

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