

## Vietnam – Asia's sweet spot

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English

Referent(en): Shasha Li

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Vietnam is an emerging country with approximately 7% annual GDP growth, a sustainable rate taking China and other developed economies in Asia into account. The government has a business-friendly approach and practices a liberal economic policy. The country has numerous trade agreements with ASEAN countries, China, the EU, the US and others as well as low labour costs with strong work ethics and a favourable demography. A combination attractive for industrial production and manufacturing relocation.

### Shasha Li

Senior Portfolio Manager Asia, Bellecapital AG

Shasha Li Maffi is an Asian investment specialist with more than 14 years of experience. She boasts a vast expertise in relation to sectors and companies as well as the economic and political dynamics of many Asian countries. She adopts a fundamental value approach, backed by sound and broad research at both the macro and company level. Over the years, she has built an extensive network of elite Asian hedge fund managers, Asian strategists and industry specialists, which she constantly uses to gain further macro, sector and company insights and to validate her investment views and cases.

Shasha began her career as an Asian equity analyst at Abrir Capital Advisors (Hedge Fund company) at the time when China started opening up its economy. She was initially engaged in doing extensive research on China IPOs. Later on she was in charge of managing the Greater China and South East Asian books within the firm's Asian Long/Short Fund. It was during this time that she started to build her extensive knowledge about Asian companies, both private and state-owned.

Shasha has been managing the Galileo Asia Fund (until 2011 a white-labelled fund for Clariden Leu) since 2007. Additionally, she manages an actively managed Vietnam certificate since 2012 and the Galileo Vietnam Fund since 2018. In the past, she also managed the Galileo Pacific Fund, a fund of Asian hedge funds, and co-managed a white-labelled global emerging markets fund sponsored by HSBC.

Shasha holds a Master in Business Administration from the University of Geneva. She grew up in China and speaks fluent Mandarin.