
Kamco Invest hosts a discussion titled “Private Market Opportunities in Asset Allocation Strategies”

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Kamco Invest, in collaboration with New York Life Investments, hosted an exclusive discussion exploring private market opportunities within asset allocation strategies. The session featured senior representatives from both organizations and attracted a select audience of clients and investors with a keen interest in the topic.

Mohammad F. Al Othman, Senior Executive Director of Alternative Investments, emphasized in his welcome note the critical role of diversification in asset allocation. He encouraged expanding beyond equities and fixed income to include alternative asset classes such as real estate, private equity, and private credit. Additionally, he emphasized Kamco Invest's proactive role in this domain, showcasing its strategic alliances with prominent international partners in the alternative investment space with the primary focus on yield delivery.

Lauren Goodwin, CFA, Chief Market Strategist at New York Life Investments, started by delivering an insightful presentation titled "Macro Pulse: Tackling the Turning Point." She explored key near- and long-term trends shaping the global economic and investment landscape, providing a comprehensive outlook. A significant portion of her presentation focused on the implications of the U.S. elections, addressing investor concerns about the potential extent of Trump's influence and the anticipated effects on policy, geopolitics, and key market dynamics.

Goodwin highlighted the evolving global economic landscape, focusing on the U.S.'s "soft landing" amid disinflation, robust economic activity, and potential Federal Reserve rate cuts. However, lingering high rates pose risks as the delayed impacts of monetary tightening become evident. Globally, growth remains uneven, with Eurozone credit conditions tight, China's leverage issues weighing on its medium-term prospects, and Japan demonstrating resilience through structural reforms. She underscored a broadening investment opportunity set, driven by higher yields and transformative megatrends such as supply chain re-globalization and the energy transition.

Key investment takeaways emphasize diversification and risk management, including exposure to alternative assets and commodities, balanced credit portfolios, and infrastructure investments. She also highlighted long-term structural shifts, from AI innovation to energy independence, as pivotal for navigating uncertainty and inflation volatility. With geopolitical risks and sector-specific pressures, she advocated a nuanced, forward-looking approach to asset allocation that captures emerging opportunities while hedging against downside risks.

Following her presentation, Goodwin joined a dynamic panel discussion alongside Dalal J. Al Shaye, CFA, Senior Vice President - Alternative Investments at Kamco Invest, to explore asset allocation strategies and private market opportunities. The session was moderated by Faisal AlOthman, Director - Equity & Fixed Income at Kamco Invest, fostering an engaging exchange of insights and perspectives.

AlOthman opened the discussion by highlighting the importance of satisfying investors' demand for consistent and sustainable returns that they have been accustomed to through Private Markets participation. Whether in the form of yield / distributions, or investments that offer less mark-to-market risk such as the ones available in Private Markets, Kamco Invest endeavors to deliver opportunities that meet client expectations.

The standout insight from the panel discussion was the emphasis on alternative investments, which offer significant diversification benefits and rank among the least correlated opportunities in both public and private markets.

Goodwin addressed the performance dynamics of alternative investments, emphasizing their unique advantage of being driven by diverse return sources rather than being heavily impacted by global market fluctuations. Despite their comparatively lower liquidity than traditional investments, she underscored their resilience and potential to deliver robust performance through varied economic conditions.

Al Shaye explored the dynamics of private equity and venture capital as pivotal components of the alternative asset class. She provided valuable insights into the transformative journey of successful regional tech companies, tracing their growth from initial funding stages through venture capital investments to their eventual public listings on regional stock markets, fueled by governments' support and initiatives.

By highlighting these success stories, Al Shaye emphasized the importance of investing in such companies, showcasing their potential to deliver strong returns while contributing to the broader economic ecosystem. Such investments not only

provide exposure to high-growth businesses but also play a crucial role in fostering innovation, supporting business scalability, and driving regional economic development.

AlOthman concluded the discussion by emphasizing the importance of contemplating the future to take necessary actions. For every challenge there lies an opportunity and Kamco Invest positions itself to guide its clients through the multitude of challenges ahead.

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