

SEPTEMBER 09, 2024

# PHILEQUITY CORNER

By Wilson Sy

## Philequity Corner: 20 Years of Financial Education

*Philequity Corner* is celebrating a dual milestone this year—its 20th anniversary as a constant source of market insights, and the 30th anniversary of our flagship, *Philequity Fund*. Over the past two decades, the column has served as a platform for educating both seasoned investors and ordinary individuals alike, helping them navigate the nuances of investing.

## A Legacy of Stability

From our flagship *Philequity Fund*, we've expanded into a diverse family of seven funds, each designed to meet varying financial needs. The lineup now includes the *Philequity Dividend Yield Fund*, *Philequity Alpha Fund*, *Philequity Bond Fund*, *Philequity Dollar Income Fund*, *Philequity MSCI Fund*, and *Philequity PSE Index Fund*. This reflects our commitment to provide investors easy access to sound financial investments and options to help them pursue goals of growth, income, or stability.

## Our Education Mission

*Philequity Corner* was founded with the mission of empowering investors in their financial journey. The column shares expertise developed over years of managing investments, guiding readers through various market conditions. Our goal is to provide timely, practical market lessons that help readers make more informed financial decisions.

## Our Learning Journey

What began as a commitment to educate others became a mutual learning experience. Writing a weekly column requires significant investment of time and effort, with each piece meticulously researched and proofread multiple times. Over 20 years, we have written and contributed 1,040 articles for *The Philippine Star*. This process has broadened our knowledge while benefiting our readers.

## "Opportunity of a Lifetime": A Reference

The lessons shared through *Philequity Corner* were compiled into a book titled "Opportunity of a Lifetime," which has become a reference for some of our readers. The book captures important lessons and analyses from the column, serving as a resource for both experienced investors and those new to finance.

## Influences and Continuous Learning

Warren Buffett's philosophy of lifelong learning has greatly influenced our approach to both investing and writing *Philequity Corner*. His principle, "the more you learn, the more you earn," is reflected in every column we produce.

The late Washington Sycip, a highly respected figure in Philippine business, has had a lasting impact on Philequity. He emphasized the importance of financial literacy for society at large. In the foreword to our book "Opportunity of a Lifetime," Mr. Sycip wrote:

*"Of my personal advocacies, basic education has always been a primary foundation... The issue of financial literacy should be disseminated among the widest possible members of the society... I take comfort in knowing that the person behind the Fund shares the same core values I espouse – a continuing hunger for education, commitment to hard work, and integrity in business above all."*

Our diverse board of directors enriches Philequity with expertise spanning banking, finance, entrepreneurship, technology, real estate, macroeconomics, and government policies. This broad perspectives from these industry leaders have been key to developing our approach over the years.

We're grateful to Tony Samson, who contributes for the column when I'm unavailable. His unique humor and witty writing style bring fresh and alternative viewpoints to our investment lessons, providing our readers with refreshing and enlightening content.

I'd also like to extend my heartfelt thanks to the research team who have provided invaluable assistance throughout the years.

## Navigating Key Financial Events & Current Trends

Over the years, *Philequity Corner* has covered major economic and market events, from analyzing the Expanded VAT (EVAT) in the Philippines to the 2008 global financial crisis. The column has covered four Philippine presidents, analyzing how their policies have affected financial markets.

We've explored significant global events, emerging trends and their effects in the markets, including:

- The COVID-19 pandemic's economic impact
- China's common prosperity policies and their implications
- Global inflationary pressures
- Trends in gold, metals and other commodities
- Geopolitical developments affecting global markets
- The AI revolution and its potential industry impacts
- US Federal Reserve's policy shifts and their market implications
- Currency trends, especially the US dollar and the Philippine peso

## Our Gratitude

As we mark these milestones, we reflect on our mission of empowering investors through education and sound financial strategies. We extend our heartfelt thanks to our readers and shareholders for their trust and support throughout this journey.

## Annual Stockholders' Meeting

Philequity's Annual Stockholders' Meeting and Market Outlook will be held on September 27, 2024, at 3:30 PM via Zoom webinar. Shareholders may register through <https://www.philequity.net/ASM2024.php>.