



# SOUTH WIND

## THE ROTARY CLUB OF BANGKOK SOUTH



Meetings: Friday 12.15 pm.

The Crowne Plaza Bangkok Lumpini Park Hotel, 952 Rama IV Road, Bangkok 10500 Thailand

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**President** Mark Butters • **President Elect/Membership** Nick Pisalyaput  
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**Treasurer** Adrian Topham • **Service Projects** David Record • **Sergeant-at-arms** Rudy van der Hoeven

### Today: Dr Norbert Spitz Culture in Conflict Zone

No 3409

09 September 2011

### Paul A Renaud - thaistocks.com Profitable Insights to Small-&Mid Cap Thai Stocks

**Paul Renaud** thaistocks.com gave an interesting speech on investment in Thai Stocks. Based in Phuket for the last 20 years, he set up "thaistocks.com" in 1997 to provide investment advice with a focus on Thai Stocks, particularly Small CAP stocks.

The site generates over 500 hits daily and has a membership in excess of 1,000 investors.

**Paul Renaud** thaistocks.com grew up in Switzerland and France and is multi-lingual (English, Swiss-German, French, and some Thai). He received a BA in Finance from the University of Wisconsin, USA; trained and worked for Merrill Lynch and four years later was selected as an experienced broker with Morgan Stanley.

He has a well-documented record of accomplishment of investment expertise and performance, and an in depth understanding of the US and Thailand securities

markets.

**Paul** explained that the business of investing is not easy. Most people are not trained in investment especially in stocks. He began by explaining that there are four ways of looking after cash:

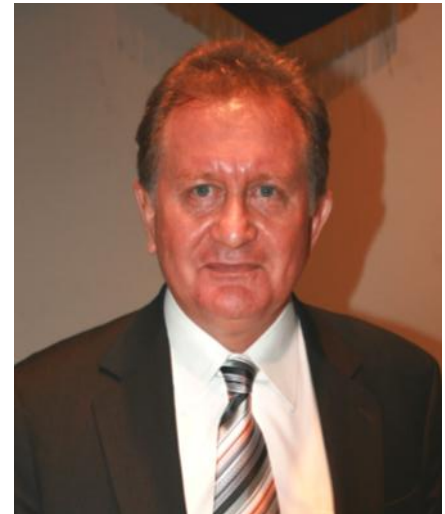
1. *Keep it under the mattress*
2. *Invest in interest bearing accounts, insurance companies or pension funds*

**This** is covered by "The 72 Rule", in that 72 divided by the interest you receive, equals the number of years it will take for your investment to double.

3. *Speculative Day Trading*
4. *Gamble*

**Fact:** \$1 invested in stocks in 1900 would now be worth \$40K, whereas \$1 invested in a bank would only be worth \$4K.

**Paul** explained that the best



stocks to invest in, with the most consistent performance, were Small CAP Companies. He went on to explain that these stocks tend to be overlooked by the large investment funds despite high dividends, due to fund company need to invest large sums of money and the need to maintain high liquidity.

*Continued on page 3*

# Rotary in Pictures



◀ Rotarian Ravi paying careful attention to what Rtn Dougie has to say, but also for a wicked right hook...



▶ Rotarian Henry and Rotarian Chris' guest discuss great tastes in Friday reading materials...



◀ P Mark hard at it while the rest of us, of course, pay very careful attention to all that emanates from the head table...



▶ PP Krit walks away with the bottle which is great news as the 50th Anniversary Party now has whiskey along with beer and wine...



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**50th Anniversary Gala Dinner**  
 Join our Gala Dinner to celebrate the 50th anniversary of the Rotary Club of Bangkok South. All members, former members, members of other clubs and friends are invited to join us to mark this milestone in our club's history.  
**Saturday, 1 October**  
**18.30 to 22.00**  
**Intercontinental Hotel**  
**Baht 1,800 per person**



**Continued from the cover**

About 2/3rds of Thailand's GDP is produced by small CAP Companies and the returns tend to be far better than those of large CAP stocks.

Small CAP stocks are generally found in the MAI as opposed to the SET, and incidentally on Friday, the SET fell by 0.5% whilst the MAI rose by 1.25%.

Paul regularly visits companies in a search for investment opportunities and is currently recommending two, one setting up a wind farm in Thailand and one who has developed an all aluminum air conditioner.

*Article by CP Geoffrey Carter*

**CDWS Trip 28-30 October**

Come join one of Rtn Wolfgang's (Water Kaiser) trips up country to inaugurate two water projects in Lampang and Sukhothai Province.

Included are visits to the Elephant Conservation Center and Sukhothai Historical Park.

To book a seat in the van, leaving Friday, 28 October after lunch, contact Wolfgang no later than 20 September.

**wolfgangminderjahn@gmail.com**



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# Khun Prakai's Club Almanac

No 3409

09 September 2011



## Happy Birthdays

Colin Hastings (11 September)

**Attendance for 2 September 2011: 63%**  
Present 46, Make-up 4, Absent 27, Leave 3, Exemption 26, Total 106

## Visiting on 2 September 2011

Bangkok: PDG Saiyud Kerdphol, Marquise Degli Albizi Eva Maria

## From Abroad

Dan Christensen (Nibe, Denmark)  
David Gibson-Moore (Manama, Bahrain)

## Invited guests

Steve Cook  
Morgan Perkins  
Michael Usher  
Stuart Baker  
Seban Nisholer  
James Nolan

## Introduced by

Chris Thatcher  
Jamie Cummiskey  
Alex Mavro  
Mike Doyle  
Carol Kuhn  
Geoff Carter

## Recent Make-ups

**Administration Committee, 30/8/11**  
John Allan, Dean Outerson, PP Don Lavoie

**Luang Sit Fellowship Committee, 30/8/11**  
PP Ole Madsen, Manu Mekdhanasarn, Rui Belo

**Club History Committee, 31/8/11**  
PP Maarten Worp, PP Nigel Hardy, P Mark Butters, Rakesh Sodhia, Dean Outerson

## Club Calendar

Friday, 16 September (Luncheon)  
Steven Van Yoder  
**Get Slightly Famous**

Friday, 23 September (Luncheon)  
Dr Mechai Viravaidhaya  
**The Mechai Bamboo School**

**Saturday, 1 October**  
**50th Anniversary Gala Dinner**  
**18.30 to 22.00**  
**Intercontinental Hotel**

Friday, 7 October (Luncheon)  
HE Michael Mann  
Ambassador of the Sovereign Military Order of Malta to the Kingdom of Thailand  
**Insight to the Knights of Malta**

For more Bangkok South Events check the club calendar at  
[rotarybangkoksouth.org/calendar-of-events](http://rotarybangkoksouth.org/calendar-of-events)

*I have come to believe that giving and receiving are really the same. Giving and receiving – not giving and taking.*  
Joyce Grenfell

*My interest is in the future because I am going to spend the rest of my life there.*  
Charles Kettering

*Great minds discuss ideas, average minds discuss events, small minds discuss people.*  
Eleanor Roosevelt

*I have failed many times and that is why I am a success.*  
Michael Jordan



[www.modenacondos.com](http://www.modenacondos.com)

For more information, please contact  
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