



O Minance

Global Equities



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Invest in American ambition,
German precision and
Chinese innovation.





Global diversification matters.

There's always a bull market somewhere. Looking outside our country's borders open us to plititudes of opportunities never available in India. Think of the rally in US tech stocks since 2016.





Minance | InteractiveBrokers

Interactive Brokers act as the platform via which your trades are executed, as well as the custodian of your capital and stocks.

Minance acts as the investment advisor who handles the research, builds and manages your portfolio.

Interactive Brokers is a global broker registered with all major securities regulators like SEC, FINRA etcetera with 43 years of broking experience.

They're the best in business.



< 15 minutes

The time it takes to open your global equity investment account. Account opening is seamless, paperless and completely online. You can fund your account using your Indian savings account. Forex conversion costs just 0.15%.



Managed Portfolios

Minance offers three portfolios that you can choose from -

1. Developed market large cap portfolio
2. Developed market mid cap portfolio
3. Emerging markets large cap portfolio

The minimum investment in each portfolio is \$5,000.

Click [here](#) to download the recent, more detailed portfolio.



Case Studies

Diageo

Equity residential

Diageo



Diageo is an alcohol manufacturing behemoth, with an outstanding collection of brands across spirits & beer. Diageo's brands include iconic names like Smirnoff, Johnnie Walker, Baileys and Guinness. It also owns 37% of Moët Hennessy.

They sell their products in over 180 countries and has offices in eighty. Diageo is listed on the London Stock Exchange and is a constituent of the FTSE 100 index. They're also listed on the NYSE.

We invested in Diageo because of two primary reasons – distribution and brand. Diageo's brands are ubiquitous, demand excellent brand recall and loyalty, are cultural phenomena and available in every street.



Equity residential



Equity Residential is a real estate investment trust that invests in apartments. As of 2018, the company owned or had investments in 307 properties consisting of 79,482 apartment units in Southern California, San Francisco, Washington DC, New York, Boston, Seattle & Denver.

It's the 3rd largest apartment owner and 9th largest apartment manager in the United States. In 2016, the company sold 23,262 apartments to Starwood Capital for \$5.365 billion. Bond markets took a hit in November 2019 due to which EQR got downgraded. With easing norms and stability in the Bond market, EQR is a strong investment given the quality of it's estate holdings.





Model Portfolio I

Emerging market large cap portfolio



Company

Origin Nation

Sector

Celltrion

South Korea

Bio pharma

Al Rajhi Banking

Saudi Arabia

Banking

Ambev

Brazil

Alcohol

America Movil

USA

Telecom

Credicor

Peru

Financial Services

Baidu

China

Technology

Coca Cola FEMSA

USA

Food & Beverage

China Life Insurance

China

Insurance

POSCO

South Africa

Steel

Qatar National Bank

Qatar

Banking

Sherbank of Russia

Russia

Financial services

China Petroleum

China

Oil & Gas

Trip.com

USA

Technology

Perusahaan

Indonesia

Electricity



Model Portfolio II


Developed market large caps



Company

Origin Nation

Sector



Broadcom	USA	Semiconductors
Ball Corp	USA	Aerospace
Boston Scientific	USA	Manufacturing
Cisco	USA	Technology
Diageo	UK	Alcohol
Equity Residential	USA	Real Estate
Linde	Germany	Chemicals
Lowe's	USA	Retail
Nestle	Switzerland	Food & Beverage
Novartis	Switzerland	Pharma
The Progressive Corp	USA	Insurance
Synopsys	USA	Technology
TC Energy	Canada	Energy
Texas Instruments	USA	Technology
Veeva Systems	USA	Technology
Workday	USA	Technology
Welltower	USA	Real Estate
Xilinx	USA	Semiconductor
YUM Brands	USA	Food & Beverage



Taxation

Tax treatment of foreign stock gains is similar to that of debt funds - short term capital gain when held for less than 24 months, otherwise long term capital gains. Dividend are taxed in India and the country to which the company belongs.

If the foreign dividend has suffered double taxation, you can claim double taxation relief either as per the provisions of Double Taxation Avoidance Agreement (if any) entered into with that country and India or you can claim relief as per section 91 (if no such agreement exists).

More info here: <https://minance.com/taxation-of-foreign-shares>



Costs

Zero account opening cost

Brokerage: \$0.005 per share or 1% of traded value, whichever is lesser

Annual management fee of 1%, 0.25% charged quarterly

Annual performance fee of 10%, charged quarterly



Compliance

Minance is an advisory partner with Interactive Brokers
with **Registration Number F3364006**

Minance is a SEBI Registered Investment Advisor – **INA200012434**



Risks

Currency fluctuations: Currency rate changes can affect your return. A weakening Rupee increases your return and vice versa

Geo-political risks, especially with some of the emerging economies

General systematic risk as normally associated with stocks markets

Read out risk disclosure here: <https://minance.com/risk-disclosure>



Benchmarks

Developed market large cap

MSCI EAFE Large Cap Index 

Developed market mid cap

MSCI ACWI Mid Cap Index 

Emerging market large caps

MSCI Emerging Markets Index 



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Portfolio sheet



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