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Emergo Wealth presents

 **The 2nd INVESTMENT**
Expert Conference 2015



Investing in a Global Marketplace

We welcome you to our July Newsletter. This month's article comes from Christos Spanos, CFA, a general investment advisor for the LifeGoals fund. Drawing from his long experience as a fund manager, Christos discusses the merits of exchange-traded funds and their use in constructing multi-asset class diversified portfolios.

Our investment advisory team utilizes these liquid and cost effective products in client portfolios of all sizes. Email us or call us for an appointment - we can help you invest in globally diversified portfolios and shield your hard-earned savings from the perils of local and regional crises.

As always, we would love to hear from you with any feedback on our articles or for any questions regarding our services.

Dr. Mike Balm, Managing Director

Exchange Traded Funds: An important tool for building diversified portfolios

Exchange Traded Funds (ETFs) were launched in the early nineties and have since been growing from strength to strength. Their success as an investment vehicle is unquestionable but as all investment vehicles their pros and cons need to be understood in order to avoid pitfalls and ensure that investment goals are met.

Advantages

Liquidity

The easiest way to understand ETFs is to think of them as mutual

Upcoming Events

11

Sept

Eurogroup Meeting

18

Sept

[Emergo Wealth presents:
The 2nd Investment Expert
Conference 2015](#)

9

October

The Cyprus Funds Summit

Chart of the Month

Investing €200 per
month for 20 years

funds that trade like stocks. That is, an investment pot where a number of investors place their cash that is invested in a predefined way into a predefined investment thesis. Investors can place and withdraw money in and out of the 'pot' as often as they like within a day. In contrast mutual funds are priced once a day at best and can be traded on the following day at that price. Often this liquidity can be weekly and in the event of some funds with illiquid strategies or underlying investments (for example real estate, or hedge funds) the tradability can be quarterly or more.

This stock-like pricing and trading characteristic of ETFs is particularly attractive for investors looking to take intraday positions or to cover a position as an event occurs. Obviously this is not a characteristic that makes a massive difference to long-term investors but it can be very useful to more active strategies.

[Click here for more](#)



About Emergo Wealth

Emergo Wealth Ltd. is a fully-fledged financial services and investment management company, built on world-class professional expertise, integrity and transparency. We provide investment advisory, asset and portfolio management, brokerage and administrative services that enable our clients to rely on turnkey, total solutions to manage their business and grow their wealth.

We offer corporate finance advisory and management consulting services, including advice on debt restructuring and on M&A transactions. Our research desk offers a range of proprietary reports on a number of sectors of the Cyprus economy as well as ad hoc analysis reports upon request.

Emergo Wealth is registered with the Cyprus Securities & Exchange Commission under the provisions of the applicable legislation (License Number 232/14). More information on the Company and its products and services can be found at www.emergowealth.net.

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