

Your Need is our Focus

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Investment guru Dr Tan Chong Koay is one of Asia's most celebrated fund management pioneers. Since starting his career in 1975, he has won multiple awards for his achievements and contributions to the industry. Over his 40 years in the industry, Dr. Tan has developed a unique philosophy that has enabled him to achieve success in volatile Asian markets.



Dr. Tan Chong Koay
Founder/ CEO/ Chief Strategist
Pheim Asset Management (Asia) Pte Ltd

After 18 years of helping others build their businesses, Dr. Tan founded Pheim Asset Management Sdn Bhd (Pheim Malaysia) in 1994 and Pheim Asset Management (Asia) Pte Ltd (Pheim Singapore) in 1995. He incorporated Pheim Unit Trusts Berhad (Pheim Unit Trusts) in 2001 to broaden Pheim Malaysia's retail client base. Pheim Malaysia commenced operations on January 4, 1994, coinciding with the market peak of 465.67 tracked by the MSCI Malaysia Index. It broke the height in 1994 approximately 13 years later in 2007.

Under Dr. Tan's leadership, Pheim (Pheim Malaysia, Pheim Singapore and Pheim Unit Trusts) defied the odds to outperform broad markets and peers over numerous market cycles, succeeding in the uphill task of making money during bouts of irrational market exuberance. Throughout this, Pheim has held fast to its philosophy of not being fully invested at all times.

Dr. Tan's achievements have been widely recognized, and both he and his firms have been well-rated. In 1987, William Mercer Zainal Fraser rated him as the Top Manager for Retirement & Pension Funds in Malaysia, the year of the Black Monday Crash. That same year, the top three funds showed returns of between 27% to 35% compared with the KLCI's 3.99%, significantly higher by between 23% to 31%.



In 1992, The Malaysian Emerging Companies Fund Ltd – which Dr Tan had managed while working for John Govett (Asia) Pte Ltd in Singapore – was ranked first by Micropal in the category of Investment Trust in the one-year Far East Ex-Japan (Single) sector. The Singapore SESDAQ Fund – under Dr. Tan’ s supervision until November 1993 – was ranked first in a Micropal rating of Far Eastern Country Funds 1993.

Both Dr Tan and Pheim ended the 1990s on a high note. In 1998, Bloomberg named Dr Tan the “Second Board King” for his welltimed investments in small-cap companies over 1995 and 1996. In 1999, Pheim Singapore became one of the country’ s first boutique fund managers to be granted the Investment Adviser Boutique Fund Manager Licence by the Monetary Authority of Singapore(MAS).

The Pheim group continued its winning streak well into the 2000s. In 2002, Pheim Singapore became the country’ s first boutique fund manager to be granted a full Investment Adviser’ s Licence, now known as the Capital Market Services (Fund Management) Licence. In 2006, Bloomberg bestowed the title of “Southeast Asia’ s Small-Cap King” upon Dr Tan.

Dr Tan’ s wish has always been to build a consistent long-term track record in Asia, a market which is susceptible to booms and busts alike. With his experience investing in small, medium and large cap companies and the support of institutional clients including Government-related sovereign and pension funds, he helped boost the total asset under management (AUM) to US\$1.8 billion at its peak in December 2010. However, Pheim subsequently lost more than US\$1 billion in AUM after Pheim Malaysia and Dr. Tan lost an appeal on a civil action by the Monetary Authority of Singapore.



“Setbacks aside, Pheim’ s overall track record underscores Dr. Tan’ s perseverance and the validity of his investment philosophy.”

Setbacks aside, Pheim’ s overall track record underscores Dr Tan’ s perseverance and the validity of his investment philosophy. Despite having lost some of its initial appeal, Pheim went on to win a record 18 awards between 2012 and 2015, including:

1. On the 20th anniversary of Pheim Asean Emerging Companies Fund (Pheim Asean Fund) on February 3, 2015, it was ranked the top fund for all the 1-to 20-year periods among all Equity Asean of Lipper Global Classification under International Offshore Universe, in terms of total returns in US\$. Since its launch in 1995, the fund recorded a return of 497.37%, outperforming FTSE AW Asean Index’ s 44.56% by 452.81% and beating its top competitor’ s record of 94.52% by 402.85% for the 20 years ended February 3, 2015.
2. Dana Makmur Pheim (Balanced Malaysia Islamic Fund) was ranked No. 1 for three-year, five-year and ten-year periods by Thomson Reuters and The Edge for the best Mixed Asset MYR Balanced Islamic Category in 2015. For the ten years ended December 2015, the Fund registered a return of +164.89% versus benchmark return of +88.82%.
3. Pheim Malaysia was ranked No. 1 for Best 3-Year Return on Investment (ROI) Domestic Equity Portfolio Manager 2015 and Best Domestic Equity Portfolio Manager Year 2015 by the Employee Provident Fund (EPF) of Malaysia. Pheim Malaysia has managed the Domestic Equity Mandate since April 1, 1997. For

the 19 years ended March 2016, the fund outperformed the benchmark close to 370%.

4. In March 2014, Beijing-based The China Daily named Dr Tan as one of the 80 Global Chinese Eminent Business Leaders.

Dr Tan believes that an entrepreneur should not only focus on financial success, but should also give back to society and help build the next generation. He has served the financial community in many diverse roles since the late 1990s, including positions as:

1. The Chief Examiner for the Investment Paper for the Institute of Bankers in Malaysia for 10 years, from 1997 to 2007.
2. A Committee Representative on the Executive Committee of Investment Management Association of Singapore (IMAS) for five years from 2004 to 2009.
3. A member of the Investment Advisory Committees of:
 - a. The Lee Kuan Yew Fund (LKY Fund) from January 2004 to March 2015.
 - b. The Lee Kuan Yew Fund for Bilingualism from March 2012 to March 2015.

He has also personally mentored many of today's business leaders, who have gone on to hold key positions in their sectors. In late 2015, he published 'Rising Above Financial Storms', a book on the knowledge he has gleaned over 40 years of investing. All profits from the book will go to charity.

With his solid track record and proven ability to navigate financial crises, Dr. Tan has continually demonstrated remarkable tenacity, perseverance and skill. His investment philosophy of not fully invested at all times will benefit the global fund management industry, and the rest of the world, for many years to come.

来源 : Pheim Asset Management Sdn Bhd

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