COMPANY Insight

Opportunities abroad

Yoma Strategic’s major shareholder Serge Pun tells MANO SABNANI about the company’s origins and its recipe for success

Yoma Strategic (SGX:YOD) has been highlighted as a potential beneficiary of the re-opening of Myanmar following the election in November 2010 and the establishment of a new constitutionally elected government in April 2011. The competitive edge can be summarised as:

- Proven management in each of our chosen business segments
- A strong track record and brand recognition with one of the Myanmar’s leading business groups, the Yoma Group, which enables Yoma to have access to opportunities that would otherwise be unavailable to those outside Myanmar
- Well-established in Myanmar at the time when the country was marking the start of the VFF in terms of re-joining the global economy, likely to be accompanied by an explosion in economic growth and resulting business opportunities
- YOMA’s management and founding shareholder, have a proven track record of investment and management in Myanmar and in particular, so much so that the Myanmar Yoma Group is located in a globally respected international stock exchange
- This is perhaps the most important ingredient, as it is the only Myanmar-based company publicly listed in a globally respected international stock exchange

As such, it is likely to be an ideal forum for our clients who are looking into business opportunities in Myanmar, regardless of the domestic or foreign exchange risk sometimes associated with the Myanmar market. The country has been continuously expanding its economic and political liberalisation, the market has shown up the potential of Yoma, with its projects now underway, and we are positive on the country and the potential of our projects when completed in a few years.

Yangon’s most exciting multi-use property development;

YOMA has always strived to be a market leader in the development of office, retail and residential properties in the Yangon area. YOMA is the only Singapore-listed company with its business conducted in Myanmar.

The business climate in the two markets that we operate in must be one of the most encouraging in the world and it is debatable whether there has ever been a better time to enter into both markets and see the potential of the country.

The reason is not only the upswing of the traditional activities in property, agriculture, and automobiles, but also the new business in new sectors. In terms of property, the government’s move to sell off the assets in the central bank or similar and the investment climate, it is not ready to do anything about the country, with the start of good times not being so long ago when it was a mere $37 million.

So, with the rapid opening up of Myanmar, it is not surprising to see that the potential of Yoma, with its core business of property, agriculture, and the automobile sector. We have also embarked on studying new opportunities in industries that we believe may add to our business by forming alliances with companies that possess the expertise and track record. In particular, the group has reorganised its automobile division to become the leading automobile company in Myanmar, with 100,000 acres of agricultural land suitable for the plantations, and our shares have multiplied by almost 50 years. While most of Asia surged so, with the rapid opening up of Myanmar, an experienced executive in the domestic and global markets. After many years of leadership in the domestic markets, we are capable and willing to navigate through the "thick and thin" of emerging markets as the region’s economic prospects and the political environment or any other factors.

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Serge Pun: As an experienced executive in the domestic and global markets, the group’s performance has been strongly tied to the political climate in Myanmar. In particular, the group has embarked on studying new opportunities in industries that we believe may add to our business by forming alliances with companies that possess the expertise and track record. In particular, the group has reorganised its automobile division to become the leading automobile company in Myanmar, with 100,000 acres of agricultural land suitable for the plantations.

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