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## Investment Writing Update

*Writing that's an investment in your success*

**August 2007**

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in this issue

- Make your graphs easier to understand
- Looking for a PR opportunity?
- South African interest in international investments
- Reaching the mass affluent market for financial services
- Online stopwatch
- "How to Write Investment Commentary Your Clients Will Read," Sept. 24 BSAS program

Make your graphs easier to understand

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Don't just slap labels on your x and y axes, and then figure that your graph is done. Plenty of people aren't good at interpreting graphs. Add a label that makes your point. Help your reader understand what's significant.

I like the graphs with hand-written labels that start on page 4 of [Wells Capital Management's Economic and Market Perspective](#) (July 2007).

Do you have examples of graphs you like? Please send them to me. I may use them in future issues of this newsletter or in my blog.

### **Looking for a PR opportunity?**

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If your firm has an economist on board, you've got an easy opportunity for PR in the financial press. Just pick an upcoming FOMC interest rate decision -- or other economic release -- and then pitch your expert's availability to the press.

This tactic needn't be limited to economists. I've also seen investment or fixed income strategists capitalize on this opportunity.

Your best spokespeople will be:

- Easily accessible to reporters
- Able to speak in sound bites
- Capable of using colorful expressions to make abstract financial concepts easily understood

You can read an example of [how Eaton Vance pitches its economist for commentary](#).

South African interest in international investments

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There's no big surge in international investment coming from South African investment professionals. At least that was what I heard during the social hour following a July meeting of the [CFA society of South Africa](#).

Many of the big South African players--for example, [Old Mutual](#)--already have access to foreign markets.

As for hedge funds, there's not much interest. "We have too much risk in our daily lives," said one CFA. I assumed he was talking about the high crime rate. Even in the posh Johannesburg suburb of Sandton where financial firms cluster, many office buildings hide behind guarded walls. Affluent households typically are surrounded by a stretch of electrified fence atop their walls. They also use armed response services.

Another concern about hedge funds: They're not yet regulated in South Africa. But that's coming, according to local newspapers.

The CFA society of South Africa has about 800 members, according to its website. The majority work in Johannesburg, with most of the rest in Capetown. The South African society is the only outpost of the CFA Institute on the sub-Saharan African continent, though there's talk of starting societies in Nigeria, Ghana, and Kenya.

### **Reaching the mass affluent market for financial services**

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Grab mass affluent customers now. Don't wait for them to get wealthier because they'll also become more expensive to acquire as customers. That's advice from "[Investment Preferences of the Mass Affluent](#)," a presentation by Brian Methvin, managing director, Guideline.

Online stopwatch

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It's important to be brief when you make presentations.

You can time yourself in comfort of your office when you use a [free online stopwatch](#).

The stopwatch acts as a regular stopwatch or you can use its countdown feature. I find this much easier to use than the second hand on my watch.

### **"How to Write Investment Commentary Your Clients Will Read," Sept. 24 BSAS program**

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You invest a lot of effort in writing your quarterly client letter or commentary. Wouldn't it be nice if your clients actually read it? Some simple, quick tips can spice up your commentary without landing you in trouble with your Compliance Department. This interactive program will teach you to make your text reader-friendly without stripping it of meaty content.

Here's the feedback on this presentation from the CFA Society of Washington, D.C. "The society was very pleased with your presentation!

"Some of the comments from attendees included:

- An interesting topic, outside the CFA norm
- Great presentation, very well done (this was noted numerous times)."

[Register for this program](#) led by Susan Weiner, CFA. If you can't attend the September 24 program, contact Susan to present customized training at your company.

P.S. Read "[The rich are getting richer, according to U. of Michigan research.](#)"

P.P.S. Read "[Tips for helping you write marketing materials.](#)"

Quick Links...

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- [Susan Weiner Investment Writing Website](#)
- [Investment blog by Susan](#)
- [Marketing and communications blog by Susan](#)

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