

“Patiently investing in long-term demographic trends will set up your portfolio for sustained supergrowth.”

Fortune, June 8, 2007
“6 Trends to Bank On,” Tom Gardner



DEMOGRAPHIC INVESTING CONSIDERS THREE ESSENTIAL QUESTIONS:

WHO?

WHO ARE THE DOMINANT POPULATION GROUPS?

In every decade, there are demographic changes involving large and influential population segments, generational groups of consumers prized for their relative size, wealth or both.

WHAT?

WHAT ARE THE ESSENTIAL NEEDS OF EACH GROUP?

Each population segment, while diverse in its individual members, has needs that are shared across a wide range of people within the demographic.

WHERE?

WHERE ARE THESE GROUPS LIVING, WORKING & MOVING?

The concentrations and migrations of population groups lay the groundwork for current and future consumption patterns.

AND THEN ASKS... HOW?

HOW DO THESE FACTORS COME TOGETHER TO CREATE INVESTMENT OPPORTUNITIES?

Demographic analysis is one of the most effective ways to evaluate your investment choices. Why? Because it is based on investing in the goods and services that the country's largest population groups are most likely to consume over time, in the regions experiencing the greatest growth.

Demographic investing is built on the most fundamental, long-term economic and societal trends—from population shifts to generational differences to domestic migration patterns. Realistic and pragmatic, it is based upon long-term trends and common-sense analysis.