

# Mutual fund picks: Basic materials and energy

	MARKET CAP (\$M)	AUG 25 - NOV 25 NET BUYS (\$M)	NOV 25 SHARES HELD (MILLION)	AUG 25 SHARES HELD (MILLION)	3-MTH CHANGE (%)	TOP FUND BUYERS/SELLERS	PRICE AS AT NOV 25 (\$)	PRICE AS AT AUG 25 (\$)
Top five net buys by global mutual funds								
<b>K1 Ventures Limited</b>	405.8	1.6	80.4	71.7	12.1	Evermore Global Value Fund; et al	0.188	0.165
<b>Ezra Holdings Limited</b>	319.6	0.8	228.2	219.3	4.0	Vanguard Total International Stock Index Fund; et al	0.109	0.106
<b>Krisenergy Limited</b>	475.2	0.2	71.0	70.3	1.0	SEI Global Master Fund Plc - SEI Pacific Basin (ex-Japan) Equity Fund; et al	0.320	0.260
<b>China Sunshin Chem Hldgs Limited</b>	186.2	0.1	0.3	0.2	100.6	Policemen's Annuity and Benefit Fund of Chicago - Acadian Asset Mgt, LLC; et al	0.380	0.320
<b>Swiber Holdings Limited</b>	105.3	0.0	30.8	30.6	0.4	DFA International Small Company Portfolio; et al	0.230	0.202

## Top five net sells by global mutual funds

<b>First Resources Limited</b>	3,054.8	-20.9	213.3	223.4	-4.5	Fidelity Series Emerging Markets Fund; et al	1.935	1.510
<b>Rex International Holding Limited</b>	149.9	-3.6	67.3	97.2	-30.7	Fidelity Funds SICAV - Pacific Fund; et al	0.119	0.098
<b>Pacific Radiance Limited</b>	227.8	-0.8	18.0	20.6	-12.6	Legg Mason Western Asset Asian Enterprise Trust; et al	0.315	0.315
<b>Vard Holdings Limited</b>	358.7	-0.4	165.0	165.8	-0.5	Fonditalia Equity Pacific Ex Japan; et al	0.305	0.320
<b>Linc Energy Limited</b>	128.9	-0.3	10.8	12.4	-13.3	Vanguard Total International Stock Index Fund; et al	0.210	0.095

Notes: Data from Ipreo. For enquiries, please email [bd@shareinvestor.com](mailto:bd@shareinvestor.com). Net buy/sell calculated based on net change in shares held by mutual funds and closing prices dated Nov 25, 2015