

Mutual fund picks: Consumer goods stocks

	MARKET CAP (\$M)	NOV 18 FEB 18 NET BUYS/ SELLS (\$M)	FEB 18 SHARES HELD (MILLION)	NOV 18 SHARES HELD (MILLION)	3 MTHS CHANGE (%)	TOP FUND BUYERS/SELLERS	PRICE AS AT FEB 18 (\$)	PRICE AS AT NOV 18 (\$)
Top five net buys by global mutual funds								
Thai Beverage Public Co Ltd	17,862.3	81.0	3,074.2	2,960.2	3.9	American Funds Capital World Growth and Income Fund; et al	0.710	0.705
Petra Foods Limited	2,449.3	9.8	138.7	136.3	1.8	First State Asia Pacific Fund; et al	4.000	3.700
Sino Grandness Food Ind Gp Ltd	283.3	1.7	49.2	45.1	9.2	PHEIM SICAV-SIF - Asean Emerging Companies; et al	0.420	0.455
Breadtalk Group Limited	412.4	0.7	17.3	16.9	2.7	Asia Pacific Value Smart Select; et al	1.460	1.435
QAF Ltd	576.1	0.3	24.1	23.8	1.4	CREF Stock Account; et al	1.040	0.960

Top five net sells by global mutual funds

Olam International Limited	4,995.4	-200.5	177.2	277.5	-36.1	Orbis Global Equity Fund; et al	2.000	2.220
Golden Agri-resources Ltd	5,466.4	-26.1	1,368.1	1,429.6	-4.3	Advisors Inner Circle Fund II - Kopernik Global All-Cap Fund; et al	0.425	0.460
Wilmar International Limited	21,107.5	-21.3	292.3	298.7	-2.2	Eastspring Investments - Developed Asia Equity Fund; et al	3.290	3.230
Bumitama Agri Ltd	1,848.9	-2.2	61.3	63.4	-3.4	Fidelity Funds- Asean Fund; et al	1.050	1.050
Indofood Agri Resources Ltd	1,029.9	-1.0	50.1	51.5	-2.8	PHEIM SICAV-SIF - Asean Emerging Companies; et al	0.710	0.770

Notes: Data from Ipreo. For enquiries, please email bd@shareinvestor.com. Net buy/sell calculated based on net change in shares held by mutual funds and closing prices dated Feb 18, 2015