

In-Cap Thematic

Agriculture and Infrastructure - “Both Consumption and Production are Growing Fast”

PCP, in partnership with AA+ rated BNP Paribas, has created **In-Cap Thematic** designed to respond directly to the economic and investment issues of the day. The first issue utilises investment themes that are widely regarded as offering outstanding potential for strong returns going forward and is complemented by outstanding, guaranteed income options to cushion the investment over the next few, difficult years.

Agriculture and Infrastructure are two areas that are expected to excel in the coming years and **In-Cap Thematic – Agriculture / Infrastructure** seeks to offer an opportunity to share in their anticipated growth.

Why Agriculture & Infrastructure?

Macro-economics dictates that the main needs of human beings drive their investments. Agriculture and Infrastructure are heavily influenced by macro events and due to a growing urban population, higher quality of living standards, and increasing demand in the emerging markets, should strongly benefit in the future from increased consumption.

“On the demand side, changing diets, urbanisation, economic growth and expanding populations are driving food and feed demand in developing countries. Globally, and in absolute terms, food and feed remain the largest sources of demand growth in agriculture. But stacked on top of this is now the fastgrowing demand for feedstock to fuel a growing bioenergy sector. While smaller than the increase in food and feed use, biofuel demand is the largest source of new demand in decades and a strong factor underpinning the upward shift in agricultural commodity prices”.

OECD-FAO Outlook 2008- 2017

“Investors in infrastructure find it easier to get capital for deals than other asset classes such as real estate, private equity and retail.”

George Ochs, MD Real Estate & Infrastructure – JP Morgan
Financial Times September 2008

In-Cap Thematic offers outstanding Income and growth opportunities backed up by solid research and stock selection. Its features, in any market, would make it an attractive investment but in today’s climate of turbulence and falling returns, it offers a solid income over the next three years while markets settle as well as substantial growth opportunities and a substantial degree of capital protection.

In-Cap Thematic

- Medium-term BNP Paribas Certificate – 5 years max
- Early Recall possible from year 4
- 12% Guaranteed Coupon in year 1, 2 and 3
- Potential for Uncapped Returns from year 4
- Full Capital Protection at maturity if the Reference Basket is not below a 60% Barrier Level
- Convincing Backtesting Results with an annual hypothetical return ranging between 9.83% and 36.62%
- Tradable asset with daily liquidity

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