

> **Fortress Investments:****Capturing the Essence of the Times**

FORTRESS

Private Banking &amp; Wealth Management

Fortress is a global leader in private banking and wealth management. Based in Dubai, the Fortress team is comprised of investment advisors possessing decades of experience in international finance across all major asset classes. The firm is driven by its mission to provide holistic financial solutions and surpass client expectations, emphasizing a balanced approach to capital growth. Taking advantage of its strategic location in Dubai, Fortress is able to provide an extensive array of investment options that benefit from both the political stability and the climate of economic growth in the UAE.

Fortress has created specific investment vehicles, such as the 2020 Emirates Taleem Sukuk (2020ETS) and Vanguard, which foster and promote foreign investment into the region.

Attracted by the UAE's favourable tax laws and its climate of economic growth – as well as the firm's strong performance record – the firm's clients have allocated significant portions of their investment portfolios with Fortress.

Streamlining the sourcing of foreign investment capital, has allowed Fortress to implement its strategy of success. With the launch of 2020ETS, Fortress will enrich and expand the educational landscape of the UAE, through the creation of three new innovative American curriculum schools by 2020.

**VEHICLES WITH SOLID FOUNDATIONS**

Fortress defines and differentiates itself by developing advanced investment vehicles that are built on a solid foundation of underlying security. This insulates investors from market risk and mitigates the impact of political, economic, and industrial instability. The 2020ETS is aimed at the development of recession-resistant and market-leading Dubai institutions of learning. This process is to take place within the framework of Shariah compliancy, thereby making the investment vehicle attractive to Islamic investors seeking stable returns.

The 2020ETS bond issue aims to raise \$200m, marketed in \$5,000 tranches, to further the education ambitions and objectives of the United Arab Emirates. The capital raised is to be applied towards the realization of the goals set in the Dubai 2020 agenda. It entails not only the building of new American curriculum schools but also the opening of vocational and special needs schools. It is hoped that the new learning institutions will attract students from all over

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the GCC and from elsewhere in the Middle East and North Africa as well.

The bond issue is being marketed as a unique investment opportunity that not only benefits from the highly dynamic and profitable UAE

education sector, but contributes to societal development as well. Fortress is the sole distributor of the 2020ETS. The subscription period is currently running and will close on Sept. 30. Investors have a choice of two, four and six year maturity terms.

**INVESTMENT GRADE**

The US Export-Import Bank has now approved and endorsed the United Arab Emirates for both short-term and long-term financing, making the country more attractive from an investment perspective. This has helped Fortress Financial raise significant chunks of investment capital throughout the recent downturn.

“We’re willing to stand by every investment decision we make. The returns we’ve seen aren’t magical. There’s no magic genie at work. We search for quality investments at a bargain following the recipe pioneered by Benjamin Graham and Warren Buffet, the greatest investment minds ever. “We’ve positioned ourselves well and look forward to a sustainable and fruitful cycle,” says Fortress Managing-Director Hamed Mokhtar.



In Pictures: Fortress Investments Team



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“The now turbulent financial markets offer fast-moving fund managers the opportunity to tailor certain products to stimulate investors and increase capital thereby taking full advantage of opportunistic times. Value fund managers across the board cannot deny buying power in today’s market is golden. With prime, A-grade stocks undervalued the way they are due to considerably negative market sentiment on a global scale, one cannot expect a rapid turnaround, but a turnaround nevertheless is inevitable.”

#### **GOLDEN OPPORTUNITIES**

Much like Berkshire Hathaway, Fortress Financial has smartly exploited the lean times by bargain hunting, snapping up select discounted shares in what effectively became a global stock sale. Glorious times indeed, that bode well for the near future as economic activity picks up its former pace promising even greater future returns than anticipated.

The scope of Fortress’ investments includes education, but also spans including government services, financial services, legal services, and real estate, as well. With subsidiaries throughout the UAE and outside the country, the firm’s managed asset portfolios and client base have significantly and robustly expanded since its inception. However, Fortress has not sacrificed quality at the expense of growth. The company maintains rigorous and selective processes to screen potential investors and investment allocations alike. Strong leadership, a proven track record of success, an investment vision built on managed risk, and stringent client criteria requirements have enabled Fortress to become a trusted investment leader, that continues to innovate, grow, and set new industry standards of excellence. ❖