



# Executive Summary on Published Research

Q4'2025

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## Forbes Articles by Chief Investment Officer, Ivan Illán, AIF®, CFS®



### “Three Strategies For Accessing Growth In Asian Markets”

Published October 28, 2025

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#### ARTICLE SUMMARY

“Global investors face a paradox: The world is simultaneously interconnected and fracturing into distinct economic blocs”. For business leaders, especially those eyeing Asia, the old strategies no longer work. Success now requires a more hands-on, localized approach.

The article outlines three key strategies for navigating today’s Asian capital markets:

1. **Embed Intelligence, Don’t Observe Remotely:** Real insight comes from being on the ground, not just reading reports. Building local teams enables firsthand understanding of market dynamics and regulatory nuances.
2. **Build Bridges, Not Barriers:** As global markets decouple, having a regulated presence in financial hubs like Hong Kong or Singapore is essential to access growth and talent across Asia.
3. **Adopt a Truly Global Mindset:** Move beyond a home-market perspective by embedding Asian insights at the heart of strategy. Build culturally fluent teams, foster cross-regional collaboration, and design investment processes that treat foreign markets as a central, not supplemental, driver of global growth.

The era of passive globalization is over. To capture Asia’s growth, investors must be present, connected, and genuinely global in both mindset and operations.



## **“The Quiet ROI Of AI: How Midsized Companies Can Win Without Generative AI”**

Published November 18, 2025

[Click Here to Read Full Article](#)

### **ARTICLE SUMMARY**

While generative AI gets most of the attention, the most meaningful returns for midsized companies are coming from less visible forms of AI, traditional machine learning and optimization tools that streamline operations and cut costs. Many firms feel pressure to invest in flashy generative tools, but leading companies are shifting back toward practical, efficiency-driven applications that deliver measurable ROI.

Examples of John Deere’s computer-vision technology, which cuts herbicide use by more than half, showing how “quiet AI” can materially improve margins. The guidance for leaders is straightforward: focus on the biggest operational costs, identify workflow inefficiencies, and make use of existing data. Companies that prioritize these foundational AI applications are seeing the strongest, most reliable financial impact.



## “The Human Alpha: Why The Next Investment Edge Is Qualitative Data”

Published December 12, 2025

[Click Here to Read Full Article](#)

### ARTICLE SUMMARY

The next frontier in investment lies in qualitative data, using AI tools like natural language processing and sentiment analysis to uncover insights beyond traditional quantitative metrics. As quantitative data becomes increasingly accessible, AI can analyze earnings calls, regulatory filings, and global news to detect subtle signals such as shifts in management confidence or emerging competitive threats that others might overlook.

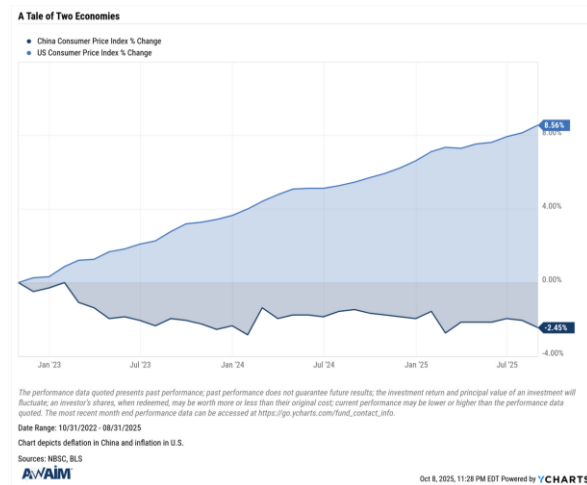
This approach helps investors gain a deeper, proactive understanding of companies and markets. However, the effectiveness of these models depends on the quality of the data and the questions driving them. Successful investing will hinge on integrating both rigorous quantitative analysis and the nuanced insights offered by qualitative data, leading to more informed and adaptive strategies.

# Research Highlights

## A Tale of Two Inflation Paths

Published October 9, 2025

[Click Here to Read Full Article](#)



### Research Highlight Summary:

The U.S. and China are moving in opposite directions on inflation. U.S. prices continue to rise while China faces low or negative inflation, signaling deflation.

**U.S.:** Moderate inflation supports growth and spending, but it also strains household budgets and keeps interest rates higher.

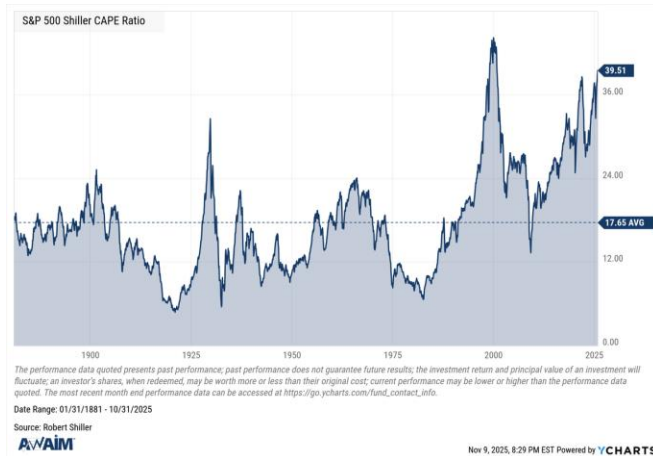
**China:** Falling prices offer short-term relief but point to weaker demand, causing consumers to delay purchases and slowing business activity.

**For Investors:** The U.S. is working to cool inflation without harming growth, while China aims to boost demand and escape deflation. These contrasting trends will continue to influence global markets and portfolio strategy.

## What's Up with the “Lofty” Stock Market?

Published November 10, 2025

[Click Here to Read Full Article](#)



### **Research Highlight Summary:**

The Shiller CAPE ratio uses 10 years of inflation-adjusted earnings to gauge market valuation. Today's CAPE sits near its highest historical levels, suggesting U.S. stocks are expensive and that long-term returns may be more modest.

While an elevated CAPE implies lofty valuations, it does not indicate the timing of when prices will normalize. Valuations can stay elevated for years, supported by structural shifts like changes in accounting, the rise of highly profitable tech companies, and a low-interest rate environment. A high CAPE signals vulnerability to shocks, not an imminent downturn.

The takeaway is to keep expectations realistic and maintain discipline: diversify globally, stay invested in a balanced plan, and treat volatility as an opportunity to rebalance rather than a reason to retreat.

# YouTube Channel



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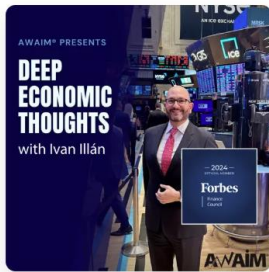
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# Podcasts



## Deep Economic Thoughts

Ivan Illán

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Forbes thought leader and bestselling Dummies author, Ivan Illán, shares timely capital markets and economic perspectives for sophisticated investors and financial advisors alike.

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