

# Index

---

- Abu Dhabi, 131–133, 134  
 Ackman, Bill, 274  
 Adam Smith (George Goodman),  
   271, 272  
*The Adventures of Ibn Battuta: A  
 Muslim Traveler of the 14th  
 Century.* (Dunn), 139  
 Africa. *See also* South Africa; Zambia;  
   Zimbabwe (Zim)  
   cell phones, 158–159  
   Chinese investments in, 157  
   Chinese presence in, 147–148  
   commodities, 144  
   electrical generating capacity, 154  
   gold discoveries, 148  
   investment opportunities, 156,  
     160–161  
   political risks, 159–160  
   power outages, 154  
 Africa Opportunity Fund, 159–160  
*Africa Rising* (Mahajan), 157  
*Africa's Power Infrastructure*  
   (World Bank), 154  
 African Rainbow Metals (AGM), 149  
 Agcapita, 235–236, 246  
 AGCO, 52  
 Agrium, 252  
 Agtmael, Antoine van, 95  
 Airbus, 266  
 Al-Katib, Murad, 239, 241–242  
 Alliance Grain Traders (AGT),  
   239–242, 246  
 Al-Suwadi, Faisal, 137  
 Ambani, Mukesh, 105–106  
 American Home Real Estate, 274  
 Angkor ruins, 200–201  
 AngloGold, 68  
 A.O. Smith, 81–82  
 Arab wealth funds, 16  
 Araújo, Maria Consuelo, 33–34  
 Arbel, 241  
 Argentina, 213  
   agricultural development, 215  
   land development, 215–216  
   potential investments in, 226  
   real estate, 214, 215  
 Arkin, William, 268  
 Ashcroft, Mark, 254  
 Asia  
   dairy consumption, 49  
   exports vs. internal consumption,  
     79  
   food production, 263  
*Asia Times*, 220  
 Asian consumers, 77–80  
*Asian Godfathers* (Studwell), 39  
 Asset seizure, 159  
 Assets under management (AUM),  
   287–288  
 Assiniboia Capital, 228–231  
 Australia  
   coal exports, 90, 171–172, 255  
   currency strength, 171  
   dairy operations, 172

- Australia (*continued*)  
 early settlement, 163  
 economic growth, 164  
 investment opportunities, 181  
 iron ore exports, 171  
 LNG boom, 164–166  
 resources of, 164  
 uranium reserves, 177–178  
 wheat exports, 172  
*Australian Small-Cap Investigator*,  
 164  
 AutoNation, 281–282  
 Aviation and aircraft, 265–266  
 Azerbaijan, 20
- B2Gold, 68  
 Båge, Lennart, 234  
 Bakken shale, 257–260  
 carbon dioxide injection, 259  
 oil boom, 258  
 owners of, 259  
 Balakrishnan, Ajit, 122  
 Banks, 278  
 Bannister, Barry, 101  
 Banpu Coal, 189–190  
 Barnett, Doug, 187–191  
 Batista, Joesley, 48  
 Battuta, Ibn, 139–141  
 Bear Lake, Idaho, 252–254  
*Beating the Street* (Lynch), 274  
 Beech, Keyes, 185, 194  
 Beer, 198  
 Bell, Gavin, 143, 145  
 Belt, Thomas, 68  
 Bernal-Correa, Andrés, 38  
 Beuret, Michel, 104, 148  
 Big Mac Index, 88  
 Biofuels, 47  
 Bird, Isabella Lucy, 257  
 Black ownership of business, 149  
 Blacks, credit access, 158  
*Blue Highways* (Least-Heat Moon),  
 247
- BNDES (development bank), 48  
 Boeing, 266  
 Bolsa de Valores de Colombia, 43  
 Bonner, Bill, 73  
 Booms and busts, 42  
 Bowles, Paul, 105  
 Bowman, Joel, 128  
 Brasil Foods, 49  
 Brazil, 45–64  
 affluence, 51–53  
 agricultural development,  
 61–62  
 Caipirinhas crisis, 62–64  
 coal requirements, 53  
 coking coal imports, 167  
 consumer credit boom, 62–63  
 crops, 46  
 currency, 59–62  
 dairy industry, 48–49  
 development bank, 48  
 farm ownership rights, 46  
 fertilizer consumption of, 251  
 Florianopolis, 58–59  
 gold reserves, 60  
 gold rushes, 180  
 inflation rate, 60  
 land ownership, 61  
 meat production, 48–51  
 metallurgical coal imports, 255  
 middle class, 52  
 oil resources, 57–58  
 opportunities in, 64  
 renationalization, 58  
 Sao Paulo, 54–57  
 soils, 46  
*Brazil on the Rise* (Rohter), 52  
 Bregman, Steve, 279–280, 281  
 Brinkley, Joel, 195  
 Brookfield Asset Management, 53,  
 244–245, 246  
 Brown, Lester, 237  
 Burj Khalifa, 125  
 Burman, Anand, 156

- Cairn India, 112–113  
*Cairn Lifts India's Energy Profile* (Leahy), 113  
 Callahan, Jonathan, 167–169, 223  
 Cambodia, 191–194  
   agricultural potential, 195–196  
   agriculture, 198  
   aquaculture, 198–199  
   Asian investments in, 192  
   cell phones, 192, 199  
   China investment in, 192  
   economic growth, 193  
   economic potential, 191  
   electric power development, 197  
   food processing/storage, 198  
   hydroelectric power, 192, 197  
   infrastructure projects, 196  
   Phnom Penh, 194–195  
   political risks, 193, 199  
   railways, 197  
   standard of living, 199  
   stock exchange, 199  
   transportation projects, 196  
   undeveloped resources, 193  
   workforce, 192, 197  
*Cambodia's Curse* (Brinkley), 195  
 Cameron, Roderick, 124  
 Campo Grande, 45  
 Canacal Energy, 30  
 Canada, 227–246. *See also*  
   Saskatchewan  
     government finances, 228  
     investment opportunities, 244–246  
     resources of, 227  
 Canada Natural Resources, 244–245, 246  
*Canadian Business*, 246  
 Canals, 69  
   Bangkok, 184  
   Colombia canal, 40–42  
   Erie Canal, 41  
   Panama Canal, 40  
   Suez Canal, 41  
 Canola, 231–233  
 Car ownership, 21  
   China, 77  
   Colombia, 35  
   India, 106  
   Phnom Penh, 194  
 Carbon sequestration, 259–260  
 Carrefour, 78  
 Casey, Doug, 62  
 Cato Institute, 265  
 Cell phones, 122, 144, 158–159  
 Celtel, 144–145  
 Cementos Argos, 26  
 Central Asia, 219–221  
 Cerrado, 46  
 Chart Industries, 169–171  
 Chavez, Hugo, 29  
 Chaze, Aaron, 106  
 Chevron, 153–155  
 Child labor, 197  
 China  
   air pollution, 90  
   bank lending, 75  
   Beijing development, 75  
   Beijing population, 77  
   bubbles, 96–97  
   car ownership, 77  
   China Model of politics, 19  
   clean water, 80–82, 83  
   coking coal imports, 167  
   consumer pressure, 286  
   corporate fraud, 85–86  
   economic development, 285–286  
   economy size, 4  
   energy demand, 89  
   engineering feats, 41  
   exports vs. internal consumption, 79  
   farmland investments, 235  
   fertilizer consumption of, 251  
   food imports, 234  
   food production, 263

- China (*continued*)
- forecasts regarding, 99–102
  - German technology, 93–94
  - gold reserves, 97–99
  - high-speed rail, 287
  - historical impact of, 284
  - Hong Kong, 84–87
  - investment dollar flow, 89
  - investment opportunities, 104
  - investments in Africa, 157
  - manufacturing capabilities, 92–93
  - metallurgical coal imports, 255
  - methanol, 91–92
  - middle class, 77, 78
  - as military power, 269
  - natural gas imports, 168
  - nuclear power production, 177
  - oil imports, 14
  - per capita income, 12
  - petrochemical industry, 90–91
  - power outages, 112, 154
  - presence in Africa, 147–148
  - renminbi valuation, 87–88
  - S-Curves in, 286–287
  - soil erosion, 83
  - stimulus plan, 75
  - water pollution, 82–83
  - water requirements, 90
  - wealth accumulation, 286
- China Marine Food, 86
- China Safari* (Beuret and Michel), 104, 148
- China Shakes the World* (Kynge), 93, 94
- China's Great Train*, 93
- Chovanec, Patrick, 97–98
- Churchill, Winston, 105
- City of Gold* (Krane), 126, 131, 132, 141
- Clayton, Douglas, 192–193, 196–198
- Cline Mining, 255–256
- Cluff, Algy, 148–149
- Cluff Gold, 148
- Coal. *See also* Metallurgical coal (met coal/coking coal)
- Banpu Coal, 189–190
  - coal development, 176
  - coal exports, 90, 171–172
  - coal prices, 89–91
  - coal requirements, 53
  - coal resources, 113–114, 173
  - coal to China, 40
  - steam coal vs. metallurgical coal, 255
- Coal & Energy Price Report*, 255
- Coal prices, 89–91
- Coburn, Forrest, 65, 67, 74
- Colombia, 25–44
- car ownership, 35
  - coal to China, 40
  - coffee production, 28
  - Colombia canal, 40–42
  - crime, 33
  - forestry, 36
  - gold mining projects, 34
  - gold production, 31–35
  - illegal mining, 33
  - infrastructure, 26
  - investment opportunities, 44
  - Keiretsu, 38–40
  - middle class, 36
  - mountains, 27–28
  - oil exploration, 30
  - oil reserves, 28–31
  - opportunities in, 35–37
  - ownership concentration, 39
  - Pacific Rubiales, 287
  - per capita income, 35
  - population, 36
  - roads, 27
  - savings and loans, 37
  - security issues, 25–26
  - sovereign debt, 43–44
  - stock selection, 37–38
  - violence, 43
- Community outreach, 154–155

- The Conquest of Brazil* (Nash), 45, 51  
 Cook, James, 256–257  
 Cook Inlet, 256–258  
 Cooper, Peter, 127, 131, 137, 141  
 Copies vs. originals, 92  
 Copper production, 10  
 Córdoba, Francisco Hernández de, 69  
 “The Covert Commander-un-Chief”  
     (Ignatius), 268  
 Covidien, 170–171  
 Credit default swap rates, 6  
 Credit vs. cash economics, 285  
 Crop processing, 239–242  
 Crow, Carl, 102–104  
 Currencies, 119  
  
 Dabur, 156–157  
 Daniels, Francis, 158, 159, 160  
 Dayal, Ajit, 124  
 DeMarco, Eric, 269  
 Denbury Resources, 259–260  
 Desalination, 83  
*Dick Cavett Show*, 271  
*Diggers, Hatters & Whores* (Eldred-Grigg), 179  
 Djandji, Marc, 202–203  
 Dooley, Cal, 262  
 Dow Chemical, 262  
 Du Plessis, Prieur, 150, 151, 152, 153  
 Dubai, 3  
     business environment, 127–128  
     construction, 129  
     containerization, 126  
     debt crisis, 133–134  
     desalination, 126  
     Dragon Mart, 15  
     electrical power, 126  
     future of, 134–135  
     growth of, 18  
     importance of, 137–139  
     real estate boom, 128–130  
     real estate bubble, 130–131, 134  
     trade, 126, 128  
  
 Duggal, Sunil, 156  
 Dunn, Ross, 139, 140  
 Duque, Juan Vasquez, 36  
 Dutch disease, 30  
 Dyson, Freeman, 260–261  
  
 “Ease of doing business survey”  
     (World Bank), 63, 67  
 Ecclestone, Christopher, 8, 9, 10, 11  
 Ecopetrol, 29–30  
 Edelheit, Aaron, 272–273  
 Eldred-Grigg, Stevan, 179–180  
 Electricity  
     electric power development, 197, 260  
     electrical generating capacity, 154  
     electrical supply, 126, 135  
     General Electric, 260  
     hydroelectric power, 73, 192, 197, 245  
     S-Curves, 285  
     shale gas vs. wind farms, 260  
*The Elephant and the Dragon*  
     (Meredith), 109  
 Emerging markets, 2–3  
*Emerging Markets Century*  
     (Agtmael), 95  
 Emsley, Doug, 228–229  
 “The End of Emerging Markets,” 2  
 Energy politics, 261  
*Engines That Move Markets* (Nairn), 41  
 Entrepreneur/owners, 279  
 Erie Canal, 41  
 Ethanol, 47, 261  
 Europe natural gas needs, 169  
 Exito, 36  
  
 Fabricato, 36  
 Farquhar, Brad, 210, 227–232, 242  
 Fertilizer, 53–54  
*Financial Times*, 3, 62, 63, 113, 122, 166, 234

- Findlay, Ronald, 221  
 Flatt, Bruce, 246  
 Flavin, Martin, 146  
 Florida housing, 59  
*Following the Equator* (Twain), 171  
 Food bubbles, 237–238  
 Food imports and exports, 234–235  
 Food supply, 227–246. *See also*  
   Saskatchewan  
   agricultural profits, 262–264  
   biofuels, 236  
   climate change, 233  
   crop processing, 239–242  
   farmland investments, 235,  
   236–237  
   food production, 263, 264  
   grains, 243–244  
   investing in, 251  
   pulses, 236–239  
   soil depletion, 235  
   topsoil crisis, 233–236  
*Foreign Affairs*, 17, 250  
*400 Million Customers* (Crow), 103  
 French, Paul, 101  
*Frontline* program, 268  
*The Fruit Palace* (Nicholl), 42, 44  
 Fry, Eric, 6, 8  
 Funk, McKenzie, 21  
 Fuqi Intl., 85–86
- Gafisa (GFA), 56  
 Gaither, William, 253  
 Gamba, Charles, 30  
 Gas pipelines, 22  
*GCC Trade and Investment Flows*  
   (*The Economist*), 138  
 General Electric, 260  
*The Gentleman in the Parlour*  
   (Maugham), 205  
 “The Geographical Pivot of History”  
   (Mackinder), 221  
 Global Competiveness rankings, 144  
*Global Resources Fund*, 287
- Gold mining projects, 44, 68–69  
 Gold One, 148  
 Gold rushes, 180  
 Grains, 243–244  
 Gran Colombia, 33, 34, 35  
 Grant, John, 138  
 Grantham, Jeremy, 235  
*Grant’s Interest Rate Observer*  
   (Stillwell), 279  
 Grupo InterBolsa, 35, 37–38  
 Gulf Cooperation Council (GCC),  
   14, 17, 138
- Hanoi, 204–206  
 Harrison, George, 146  
 Hayton, Bill, 202  
 Heinberg, Richard, 89–90  
 Hill, James J., 253  
 Holmes, Frank, 33–34, 283–289  
 Hospitals, 23  
 Hotel shortages, 116–117  
 Housing  
   affordability, 272  
   buy-rent strategy, 274  
   Florida housing, 59  
   India, 117–118  
   investment opportunities, 271–274  
   Mongolia, 212  
   Sao Paulo, 55–56  
   United States, 270–274  
*How to Feed the World in 2050*  
   (FAO), 263  
 Howe, E.W., 171  
 Hyflux, 83–84  
 Hypermarket, 78
- Iacono, Serafino, 33–35  
 IBM, 280  
 Ibrahim, Mo, 144  
*In Search of South Africa* (Morton),  
   151  
*In Spite of the Gods* (Luce), 109, 110,  
   124

- India, 105–124  
 biofuels, 121  
 car ownership, 106  
 coal resources, 113–114  
 coking coal imports, 167  
 corruption, 111, 116  
 crop commodity prices, 120–121  
 energy needs, 112–114  
 fertilizer consumption of, 251  
 food imports, 234  
 gold holdings, 119–120  
 Goldman Sachs prediction, 110  
 historical impact of, 284  
 housing, 117–118  
 Hyderabad, 118–119  
 infrastructure projects, 121–122  
 investing in, 107–108  
 investment opportunities, 124  
 Malabar Coast, 114–117  
 metallurgical coal imports, 255  
 Mumbai, 119–120  
 oil demand, 17–18  
 oil resources, 112  
 outsourcing to, 109–112  
 pollution, 108–109  
 power outages, 112  
 property companies, 117–118  
 Tata Group, 39  
 transportation infrastructure,  
 106–107  
 water requirements, 121  
 windpower, 114
- India: An Investor's Guide to the  
 Next Economic Superpower*  
 (Chaze), 106
- Indonesia, 79  
 per capita income, 12  
 population, 22
- Indorama Ventures (IVL), 189
- Intellectual property  
 vs. natural resources, 8  
 sectors, 11
- International Labor Organization, 197
- Internet, 122
- Investment Biker* (Rogers), 289
- Investment criteria, 278
- Investor travelogues, 289–290
- Iran, 18, 269
- It's a Wonderful Life* (movie), 277
- James, Kynge, 93
- JBS-Fribol, 48–49
- Jimmy Stewart profile, 277
- Kaplan, Robert, 17
- Karber, Phil, 200, 201, 204
- Kaylan, Melak, 20
- Kazakhstan  
 economic growth, 210  
 oil and gas reserves, 220  
 oil fields, 20  
 uranium reserves, 177–178
- Keating, Charles, 277
- Keay, John, 201
- Kerr-McGhee, 259
- Kindleberger, Charles, 96
- Klarman, Seth, 274–275
- Knapp, Robert, 160
- Knoll, Kerry, 254
- Krane, Jim, 126, 128, 131–134, 141
- Krato Defense & Security Solutions,  
 268–269
- Kraus, Eric, 218–219
- Krotov, Anton, 20
- Kupperman, Harris, 211–212
- Kuwait, 18
- Kuznets, Simon, 283–284
- Kynge, James, 93, 94, 109
- Kyrgyzstan, 220
- La-Cira Infantas (oil field), 29
- Latin American economies, 42–44
- Leahy, Joe, 113
- Least-Heat Moon, William, 247
- Lefèvre, Edward, 123
- Legumex Walker Inc. (LWI), 242

- Leopard Capital, 195, 196–200  
 Lewis, Scott, 195  
 Licensing vs. production, 225  
 Lipper awards, 287–288  
*Live and Invest Overseas*, 67  
 Long-term vs. short-term focus, 280  
 Luce, Edward, 109, 110, 124  
 Lukoil, 218  
 Lum, Olivia, 83  
 Lustgarten, Abraham, 93  
 Lynch, Peter, 274, 275, 277
- Mackinder, Halford John, 221, 226  
 Mackintosh-Smith, Tim, 140  
*Mad About the Mekong* (Keay), 201  
 Maddison, Angus, 4  
 Mahajan, Vijay, 157  
*The Man Who Walked Across the World* (Mackintosh-Smith), 140  
*Margin of Safety* (Klarman), 274  
 Market liquidity, 6  
 Marriott, Edward, 74  
 Marshall, Paul, 63  
 Mathiessen, Peter, 233  
 Mato Grasso do Sul, 45  
 Maugham, Somerset, 205  
 McCourt, Edward, 228–229  
 McDonald, Ian, 254  
 McEwen, Rob, 97–98  
 McGregor, James, 103  
 McKinley Capital Partners, 273  
 Meatpacking, 48  
 Medoro, 34  
 Mekong River, 201  
 Mello, Marcio, 57–58  
 MENA (Middle East and North Africa), 18–20  
 Mendelbrot, Benoit, 183  
 Meredith, Robyn, 109  
 Metallurgical coal (met coal/coking coal), 53, 54  
   imports and exports, 167, 255  
   New Elk Mine, 255  
   resources, 210  
   vs. steam coal, 255  
 Methanex, 92  
 Methanol, 90–92  
 Meyer, Michael, 77  
 Michel, Serge, 104, 148  
*The Middle East in the World Economy* (Owen), 19  
 MILA (Integrated Latin American Market), 37–38, 43, 44  
 Minas Gerais, 180  
 Mining sector, 9, 53  
 Minster, Leonard, 198–199  
 Mitchell, Malone, 224–225  
 Mittal, Lawrence, 195  
 Mobius, Mark, 289  
 Mongolia  
   copper resources, 209  
   economic growth, 210  
   gold resources, 209  
   housing, 212  
   insurance, 212  
   metallurgical coal resources, 210  
   mining potential, 209  
   oil resources, 209  
   political freedom, 210  
   potential investments in, 226  
   uranium reserves, 209  
 Mongolia Growth Group (MGG), 211–212  
 Monsanto, 252  
*Monsoon Seas* (Villiers), 16, 126  
 Morgan Stanley Capital International EAFE Index, 88  
 Morocco, 250  
 Morris, Jan, 164  
 Mortgages, 117–118  
 Morton, Henry, 147, 151, 161  
 Motsepe, Patrice, 149  
 Mouhout, Henri, 200  
 Mozambique, 285  
 MSCI Thailand Index Fund, 187  
 Mugabe, Robert, 156

- Murderers in Mausoleums* (Tayler), 216, 226
- My Car in Managua* (Colburn), 65, 67, 74
- Nairn, Alasdair, 41–42
- Namibia, 57, 178
- Nash, Roy, 45, 51
- National Geographic Adventure, 21
- National Geographic Traveler*, 115
- National security, 267–270
- Nationalization, 159–160
- Natural gas, 91
  - gas pipelines, 22
  - gas-to-liquids plant, 262
  - liquefied natural gas (LNG), 136–137, 166–172
  - natural gas imports, 168
  - natural gas needs, 169
  - natural gas reserves, 136–137, 220
  - natural gas resources, 210, 218, 222, 257
  - oil and gas reserves, 220
  - oil and gas resources, 257–258
  - oil and gas revenues, 256
  - for power generation, 260
  - shale gas vs. wind farms, 260
- The Naturalist in Nicaragua* (Belt), 68
- The New Silk Road* (Simpfendorfer), 15, 104
- New York Times*, 32, 68, 154
- New Zealand
  - agricultural development, 179
  - balance sheet recession, 174–175
  - carbon hysteria, 175
  - coal development, 176
  - coal resources, 173
  - dairy farming, 179
  - farming, 174
  - geothermal power, 176
  - gold mining, 179–180
  - investment opportunities, 181
  - oil demand, 175
  - oil resources, 173
  - precious metals, 173
  - quantitative easing, 175
  - sheep, 173
  - uranium, 176–177
- Nicaragua
  - civil war, 71
  - cost of living, 71
  - earthquakes and volcanoes, 72–73
  - energy sources, 73
  - geothermal power, 73
  - gold mines, 68
  - Granada, 69–70
  - hydroelectric power, 73
  - investment opportunities, 74
  - León, 70–72
  - money printing, 66
  - nationalization, 65
  - potential, 67
  - Nicaragua* (Walker), 74
  - Nicholl, Charles, 42–43
  - Nigeria, 285
  - North Korea, 269
  - Nuclear power production, 177
- Obama, Barak, 261
- Oil demand, 15–16
- Oil exploration, 57
- Old Town Island, 125
- One Billion Customers*. (McGregor), 103
- One up on Wall Street* (Lynch), 274
- Opportunity Dubai* (Cooper), 127, 141
- Orient Paper, 86
- Ormet, 262
- O'Rourke, Kevin H., 221
- Ortega, Daniel, 71
- Owen, Roger, 19
- Owens-Illinois, 53
- Owner-operator model (OOs), 279–280

- Pacific Rubiales, 30, 35, 44  
 Panama Canal, 40  
 Paris Hills, Idaho, 252–254  
*Passport to Profits* (Mobius), 289  
 Paulse, Haymish, 155  
 Paulson, John, 87, 270–271, 272  
 Petrobras, 47, 57–58  
 Phillips, Peter, 232  
 Phosphate, 249–250  
 Piccone, James, 259  
 Pilgrim's Pride, 48  
 Plastics, 91, 189  
 Platinum group metals (PGMs),  
 149–151  
 Platinum supply and demand, 152  
 Polo, Marco, 114–115  
 Polynesians, 2  
 Pomfret, John, 93  
 Potash, 54  
 PotashCorp, 262  
 Powell, Alexander, 146  
*Power and Plenty* (Findlay and  
 O'Rourke), 1, 221  
 Precious metals, 100  
 Priest, Diana, 268–269  
 Prudhoe Bay, 256  
 Purchasing power parity (PPP), 2
- Qatar  
 LNG exports, 168  
 natural gas reserves, 136–137  
 natural gas resources, 210
- Qinghai-Tibet railway, 93
- Raban, Jonathan, 137  
 Raipal, Amit, 63  
 Rajasthan project, 112–113  
 Rare earths, 10  
 Real estate, 117–118  
 Recycling, 10  
 Reeves, W. Pember, 179  
 Refineries, 153–155  
 Reganold, John, 235
- Reibey, Mary, 163  
 Renewable energy sources, 113, 114  
 Research and development, 22–23  
 Resolute, 259  
 Resolution Energy, 258  
*Reuters*, 62  
 Rhodes, Cecil, 146  
*Riches Among the Ruins* (Smith),  
 225, 226  
 Ridley, Matt, 260–261  
 Rio Tinto, 255  
 Robertson, Julian, 187–188  
 Rogers, Jim, 289  
 Rohter, Larry, 52, 54  
 Roscoe, Renato, 49, 52  
 Rosneft, 216–217  
 Rothschild, Jacob, 61  
 Rule, Rick, 174–177
- Russia  
 bribes, 216  
 food production, 263  
 historical impact of, 284–285  
 mining sector, 218  
 natural gas resources, 218  
 oil resources, 217  
 PGM resources, 218  
 population reduction, 217  
 potential investments in, 226  
 remilitarization of, 269  
 resources of, 219  
 and Turkmen gas reserves, 220
- Sala, George Augustus, 174  
 Sanchez, Jhon Correa, 36  
 Sand Ridge Energy, 224  
 Sandanistas, 65–66, 73  
 Saskatchewan  
 farming costs, 230–231  
 land prices, 229  
 politics, 228–229  
*Saskatchewan* (McCourt), 228–229  
 Sasol, 262  
 Saudi Arabia, 237

- Savage Shore* (Marriott), 74  
 Sayce, Kris, 164–165  
 Schmidt, Mayo, 243  
 S-Curves, 283–284  
     cars, 285  
     in China, 285  
     electricity, 285  
     oil, 285  
     steel, 285  
*Seattle Post-Intelligencer*, 235  
 Selmo oil field, 221–222  
 Service sectors, 11  
 SET Index, 188  
 Seth, Harsh, 107  
 Seth, Jayesh, 107  
 Seven Percent Club, 12  
*The Shale Gas Rock* (Ridley), 260  
 Shaplen, Robert, 206–208  
 Shiels, Stompie, 149–150  
 Shoprite, 158  
 Shukla, Rajesh, 120  
 Sierra, Ricardo Andres, 26–27  
 Silk Road, 13–16  
 Simpfendorfer, Ben, 15, 104  
 Simplot, 252  
 Singapore, 83, 207  
 Sino-Forest, 87  
 Smith, Roger, 225–226  
*The Snow Leopard* (Mathiessen), 233  
 Solomon, Steve, 72  
*Somewhere Over the Rainbow* (Bell), 143  
 Sonatel, 159  
 Soros, George, 188  
 South Africa, 142–161  
     Cape Town history, 151–152  
     corruption, 144  
     Johannesburg, 145–147  
     platinum supply and demand, 152  
     refineries, 153–155  
 Southeast Asia, 183–208. *See also*  
     Cambodia; Thailand; Vietnam  
 Southeast Asian investment oppor-  
     tunities, 208  
 Sovereign wealth funds, 129–130  
 Sprott, Eric, 254  
 Stahl, Murray, 87–88  
 Starbucks, 80  
*Star-Times*, 174  
 Stevenson, Seth, 133  
 Stillwell, Joe, 279  
 Stonegate Agricom, 252–254  
 Stotz, Andrew, 186–187  
*Stotz Stocks*, 186  
 Studwell, Joseph, 39  
 Subramanian, Arvind, 3, 4  
 Sub-Saharan Africa (SSA), 156  
 Suez Canal, 41  
 Sun Yat-sen, 21  
 Supercycles, 8–11  
*Supertrenas* (Tvede), 4  
 Sutton, Nicholas, 258  
 Sweatshops, 197  
 Swift, 48  
*Sydney* (Morris), 164  
 Syria, 19  
 Tablemac, 36  
 Tajikistan, 220  
 Takeovers, 38  
 Tata Steel, 111  
 Tayler, Jeffrey, 216–217, 226  
 Tech boom, 9  
 Television, 123  
 Tequila Crisis, 62–64  
 Thai Focused Equity Fund, 188  
 Thailand  
     Bangkok canals, 184  
     Bangkok floods, 183–187  
     Bangkok growth, 184  
     business transparency, 190  
     colonialization, 186  
     financial condition, 186,  
         188–189  
     guru investor in, 187–191

- Thailand (*continued*)  
 investment opportunities,  
 189–190  
 offshore production by, 186  
 political risks, 185–186  
 stock exchange, 186–187  
*The Economic Times*, 121  
*The Economist*, 17, 22, 23, 30, 48,  
 164  
*The Energy Report*, 224  
*The Financial Times*, 148  
*The National*, 136  
*The Times of India*, 121  
*The Wall Street Journal*, 3, 63, 185,  
 211, 263  
 Thrift conversions, 275–276  
 Thrifts, 277  
 Through the Looking Glass  
 (French), 101  
 Thubron, Colin, 13–14  
*Time of the Mango Flowers*  
 (Cameron), 124  
 Tinseth, Randy, 266  
 Titanium Metals (TIE), 267  
 Tonle Sap Lake, 200  
 Top Secret America (Frontline), 268  
 Trade history, 140–141  
 Trans-Atlantic Petroleum, 221–222,  
 224  
 Transparency International annual  
 corruption index, 144  
 Transportation projects, 22, 42  
*Travels with a Tangerine*  
 (Mackintosh-Smith), 140  
 Troubled economies, investments  
 in, 225–226  
 Turkey  
 consumer consumption, 222–223  
 investment encouragement,  
 222–223  
 natural gas resources, 222  
 oil development, 225  
 oil resources, 221–222  
 potential investments in, 226  
 workforce, 222  
 Turkmenistan, 219–220  
 Turner Investment Partners, 264–265  
*A Turning the Wheel* (Shaplen), 207  
 Tvede, Lars, 4, 207  
 Twain, Mark, 171  
 Ukraine, 219, 234  
 United Arab Emirates, 125–141, 142.  
   *See also* Abu Dhabi; Dubai  
   dollar denomination, 128  
   electrical supply, 135  
   food imports, 234–235  
   Ibn Battuta, 139–141  
   infrastructure projects, 136  
   LNG imports, 168  
   municipal services, 135  
   needs of, 135–137  
   water supply, 135  
 United States, 247–282. *See also*  
   National security  
   agricultural profits, 262–264  
   Alaskan natural gas resources, 257  
   Alaskan oil and gas revenues, 256  
   aviation and aircraft, 265–267  
   defense spending, 268  
   export infrastructure, 263  
   fertilizer consumption of, 251  
   gas-to-liquids plant in, 262  
   government spending, 268  
   grain exports, 263  
   housing, 270–274  
   imports vs. exports, 263  
   interstate highway system, 284  
   investment opportunities, 282,  
   290  
   LNG exports, 166, 169  
   manufacturing capabilities, 265  
   money printing, 180  
   nation of builders, 264–265  
   phosphate, 249–253  
   phosphate deposits, 252–254

- quality of life, 249  
 Rocky Mountain oil and gas  
     resources, 257–258  
 rural areas, 248–249  
 rural development, 253  
 service sector, 265  
 travel in, 247–248  
 Uranium mania, 178  
 Uranium producers, 178  
 Uranium reserves, 177–178  
 Urban dwellers, 12  
 Urea, 91  
 U.S. Global Investors (GROW), 286,  
     287–289  
*U.S. Manufacturing* (Turner  
     Investment Partners), 264  
 U.S.-listed China-based stocks, 86–87  
 Uzbekistan, 220  
  
 Vale, 53  
 Vencedor, 50  
 Vieira, Felipe Hoyos, 36  
 Vietnam, 201–204. *See also* Hanoi  
     agricultural storage, 203  
     capitalism, 202  
     consumers, 201–202  
     development patterns, 206–207  
     economy and debt, 205  
     gold consumption, 204  
     government control of business,  
         203  
     Japan postwar conditions, 206  
     rice, 202  
     social and political change, 202  
     state-owned-enterprises (SOEs),  
         202–203, 205  
     stock market, 202–208  
     workforce, 201  
*Vietnam: Rising Dragon* (Hayton),  
     202  
 Viettel, 192  
 Villiers, Alan, 16–17, 18, 126  
 Viterra, 243–244, 246  
 Volker, Jim, 258  
 Von Braun, Joachim, 235  
  
 Walker, Thomas, 74  
 Wal-Mart, 280  
 Walton, Sam, 280  
*Water* (Solomon), 72  
 Water filtration products, 81,  
     83–84  
 Water wealth, 72  
 Western Sahara phosphate exports,  
     250  
 Whirlpool, 52  
 Whiting Petroleum, 258  
 Whitman, Martin, 39  
 Wilson, Floyd, 261  
 Wind farms vs. shale gas, 260  
 Woodside Petroleum, 165  
 World economy growth, 11–13  
 World Nuclear Association, 177  
  
 Yukos, 216–217  
  
 Zambia, 158, 160  
 Zee Network, 122–123  
 Zhang Lijun, 82  
 Zillow, 272  
 Zimbabwe (Zim), 156  
 Zimplats, 159

<http://www.pbookshop.com>

<http://www.pbookshop.com>

<http://www.pbookshop.com>