

December 2022

Global Experience, Local Knowledge

Why BlueRocke?

BlueRocke Investment Advisors is a specialist financial advisory practice serving a select cohort of professionals and business owners, led by Dev Sarker, global financial experience living in Australia.

At BlueRocke we understand that professionals and businesses owners like you, are pressed for time and may be settling into life in Australia. This is where we come in bringing global experience with local knowledge to achieve your financial goals and wealth.

What we do

- Income, expense and debt management reviews
- Investments, managed and direct equities portfolios
- SMSFs and gearing solutions
- Estate planning to assist your wealth transfer to your intended heirs
- Cash flow, profitability and debt management analyses
- Estate planning which integrates business and family wealth
- Connections within your community

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Prepare for Economic Changes with a Broader Allocation

Many clients have been asking me recently about how to weather the current economic uncertainties and I have recommended that learning how a diversified portfolio can be prepared for a number of economic scenarios is a worthwhile investment in time.

A portfolio mix that combines both traditional and non-traditional asset classes – such as TIPS and commodities – may be better positioned for a number of potential economic and inflationary scenarios.

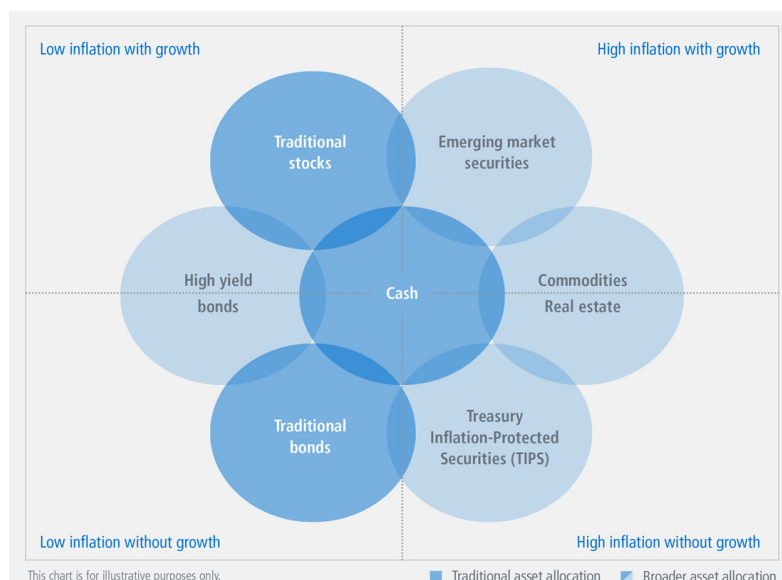
What this chart shows

Stocks, bonds and cash, which form the core of many diversified portfolios, generally add value in some economic scenarios. In higher inflationary environments, assets such as emerging market securities, commodities and Treasury Inflation-Protected Securities (TIPS) may perform better.

What it means for investors

Rounding out a core portfolio with non-traditional and real (inflation-hedging) assets can help investors participate in a broader range of economic environments while also managing volatility, which is particularly important in uncertain economic times.

If you have questions and would like your financial situation to be evaluated, please email us on ds@bluerocke.com for an exploratory meeting.



Source: PIMCO <https://www.pimco.com.au/en-au/resources/education/prepare-for-economic-changes-with-a-broader-allocation>

Global Experience, Local Knowledge

Dev's Work Experience



Dev's Education



**HAIGH'S
CHOCOLATES**



Meet Dev Sarker, BlueRocke's CEO

Dev Sarker is an experienced financial specialist and advisor, available to provide knowledge and support for clients to achieve their financial goals.

Dev has had over 35 years global financial experience and has lived across South East Asia and Australia. With experience in Singapore, Australia, the Philippines, Middle East and India, Dev brings this wealth of knowledge and experience to clients here in Australia.

Having been an Executive in organisations such as Citibank (Singapore), Standard Chartered Bank (Singapore, Philippines), National Bank of Oman (Oman, Egypt, UAE) and at Return to Work SA Dev combined knowledge of complex financial instruments to drive financial success as well as local knowledge about living in Australia. With over 10 year's experience as a financial planner in Australia Dev brings a balance in global thinking as well as local knowledge.

With a Chartered Accountants Degree from ICAEW (London) and a MBA from SOAS University London you can be confident that Dev has the education as well as the experience to help you on your financial journey.

Local Knowledge

With the build up to Christmas well and truly upon us I start thinking of those uniquely Australian gifts I can send back home.

As some of you may know I love good wine and being able to access boutique wine from the Barossa, Adelaide Hills & McLaren Vale in under an hour is a benefit of living in Adelaide.

Another gift I like to send is Haighs chocolate. Nothing says Christmas like Haighs (especially with a nice bottle of red wine! One of my favourites in recent years has been the chocolate trout...very unique!

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