

POSTCARD FROM LAGOS

Review of the first Jenga IP Roadshow Dinner

We hosted our inaugural Global Roadshow Dinner on September 26th in Lagos, Nigeria, at the Lagos Continental Hotel.

The Global Roadshow Dinner provides us with a valuable platform to engage with investors, potential clients, and the broader investment community and share insights on global equities investing.

The Jenga IP team was represented by Dede Eyesan (CEO) and Anil Joshi (COO), with David Alabi from CNBC Africa serving as the evening's moderator.

The evening was attended by 40 participants, including business executives, family offices and HNIs.

We were highly encouraged by the overall energy and engagement throughout the evening. The thoughtful feedback and insightful questions from attendees demonstrated a strong interest in deepening their understanding of global equities investing.

We extend our gratitude to the event planners for execution of the roadshow.



Overview of the Roadshow Presentation

In our initial presentation, Dede Eyesan shared the motivations and thought process behind founding Jenga IP in 2019, during his undergraduate studies at the London School of Economics.

Following this, David Alabi facilitated a panel discussion with Dede and Anil, where both participants delved into their respective areas of expertise—investing and operations.

To conclude the evening, we presented an in-depth case study focused on the food retail industry, highlighting Jenga IP's investments in two prominent emerging market food retailers: Shoprite (South Africa) and Dino Polska (Poland).



Attendee Q&A highlights

During the Q&A session, the audience sought perspectives on various topics, including our allocation to the healthcare sector, investment opportunities in Japan, and our views on emerging markets, with a particular focus on China and India.



Feedback from Attendees

The feedback received was positive, with participants highlighting the value of the insights on global equities and our emphasis on fundamentals.

We now look forward to our upcoming London Roadshow in 2025 and returning to Lagos next year!