

# Rich thinking – Summer update

The 15th year of *Rich Thinking*® research is off to a roaring start! I conducted interviews and/or investment salons in 16 different countries in the first half of 2024 including Azerbaijan and Brunei Darussalam for the first time.

Kvinno Kapital invited me to give a keynote presentation at a Nordea sponsored event in Stockholm on International Women's Day, March 8th. I shared the high level findings of my 14th annual **white paper** "What's in your investment portfolio?"

Here is the 20 minute **video clip** of my presentation. The second part of the event featured a fast-paced panel discussion with local business leaders exploring some of the implications of my research.

Following the event I did **an interview** for Nordea Funds Magazine that shared the highlights of my talk as well as my top tips for women investors.

Also in celebration of International Women's Day:

- CFA Institute published **my article** "Know Your Prospect (KYP): What's in Their Portfolio and Why?"
- CFA Institute's Enterprising Investor **podcast** featured me discussing my latest report with fabulous host Mike Wallberg.
- Morningstar's Ashley Redmond interviewed me for **her article** "Empowering Women to Invest: Closing the Investment Gap."
- Moneypenny and More hosted me as a guest speaker at their super cool private cocktail party in Copenhagen.
- CFA Society Singapore invited me to do a keynote presentation at one of their continuing education lunchtime events. Big thanks to my engaging panelists Carlo Chong, Global Partnerships Director, Financial Times APAC and Shweta Roongta, Business Analyst at UTI International Limited.

Last week for the first time I joined host Bruce Sellery on SiriusXM's "Moolala: Money Made Simple". Have a listen to our **10 minute chat** about the background of Rich Thinking, my research process, and what we can learn from investment portfolios.

Alongside Rich Thinking I am working on a couple of different commissioned research projects and I continue to write regularly for CFA Institute's Enterprising Investor, Canadian Family Offices, and Canadian MoneySaver magazine. All of my research and articles, plus international media coverage, podcasts and videos are on **my site**.

As always, I am forever grateful to the smart men and women who have generously contributed their time, energy and ideas to my research.

Happy Summer!

*Barbara*

Follow me on Twitter [@RichThinkingB](#)

Follow me on Insta [@richthinkingb\\_barbara](#)

See [www.barbarastewart.ca](http://www.barbarastewart.ca) for all research, articles and global media coverage.



*Doing some rich thinking in the lobby of The Empire Brunei*

**UPDATE: SUMMER 2024**