Buv

Tencent Holdings (0700.HK)

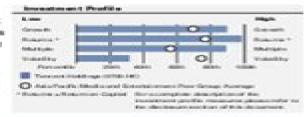
Return Potential: 9%

Equity Research

The rise of Weixin: China's social networking leader; Buy

Source of opportunity

Websin is fundamentally altering users' communication experience on smart. devices. Since its launch in Jan 2011. Weixin has established itself as China's leading mobile communication and private social networking app. providing rich media features from simple messaging to multi-user hold-to-talk to 300mn registered users. While we do not expect Tencent to meaningfully monetize Weixin in 2013E, we believe the product has become a significant component of Tencent's investment thesis, and hence incorporate its financial projection into our estimates, referencing global internet trends. Our estimates imply a HIC\$30/share valuation for Weixin.



Catalyst

We reiterate our Buy rating and expect monetization to potentially be realized in three areas: (a) Advertising. Websin's social network model leads to a virtuous cycle of reinforcing engagement that creates traffic inventory. (b) Mobile gaming has proven its revenue potential globally. We model Weixin's offerings after NHN's LINE, and expect Weixin to generate in-app revenues from micro-transactions of virtual items. (c) While mobile commerce remains at an early stage, we see optionality value considering the power of QR code enabling online-to-offline (Q2Q) mervines.



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TOPIC BOOK IS NOT TO	77.70	16.75	10.00	160,700
1075 revision (150)	0.0	171.79	1396	1000
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Washing #Some

We raise our 12-m target price to HK\$305 from HK\$280, based on 1.0X PEG Pringer beneat 440 122X 2014E EPS off 22% 2014E-17E CAGR: previously based on 2013E-16E CAGR). We lower our 2013E/14E EPS by 419/6% to incorporate near-term investment needed to secure Tencent's dominance in China's social networking space.

Key risks

Weaker-than-expected desktop gaming, near-term margin weakness from e-commerce investments, regulatory risks with Websin.

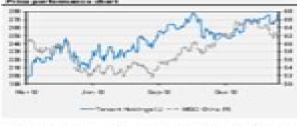
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Richard C. Wilson

Goldman Sachs Trading Training Manual:

Goldman Sachs Trading Training Manual: Bestsellers in 2023 The year 2023 has witnessed a remarkable surge in literary brilliance, with numerous engrossing novels captivating the hearts of readers worldwide. Lets delve into the realm of topselling books, exploring the captivating narratives that have captivated audiences this year. The Must-Read: Colleen Hoovers "It Ends with Us" This heartfelt tale of love, loss, and resilience has captivated readers with its raw and emotional exploration of domestic abuse. Hoover expertly weaves a story of hope and healing, reminding us that even in the darkest of times, the human spirit can triumph. Goldman Sachs Trading Training Manual: Taylor Jenkins Reids "The Seven Husbands of Evelyn Hugo" This intriguing historical fiction novel unravels the life of Evelyn Hugo, a Hollywood icon who defies expectations and societal norms to pursue her dreams. Reids compelling storytelling and compelling characters transport readers to a bygone era, immersing them in a world of glamour, ambition, and self-discovery. Discover the Magic: Delia Owens "Where the Crawdads Sing" This mesmerizing coming-of-age story follows Kya Clark, a young woman who grows up alone in the marshes of North Carolina. Owens spins a tale of resilience, survival, and the transformative power of nature, captivating readers with its evocative prose and mesmerizing setting. These popular novels represent just a fraction of the literary treasures that have emerged in 2023. Whether you seek tales of romance, adventure, or personal growth, the world of literature offers an abundance of captivating stories waiting to be discovered. The novel begins with Richard Papen, a bright but troubled young man, arriving at Hampden College. Richard is immediately drawn to the group of students who call themselves the Classics Club. The club is led by Henry Winter, a brilliant and charismatic young man. Henry is obsessed with Greek mythology and philosophy, and he quickly draws Richard into his world. The other members of the Classics Club are equally as fascinating. Bunny Corcoran is a wealthy and spoiled young man who is always looking for a good time. Charles Tavis is a guiet and reserved young man who is deeply in love with Henry. Camilla Macaulay is a beautiful and intelligent young woman who is drawn to the power and danger of the Classics Club. The students are all deeply in love with Morrow, and they are willing to do anything to please him. Morrow is a complex and mysterious figure, and he seems to be manipulating the students for his own purposes. As the students become more involved with Morrow, they begin to commit increasingly dangerous acts. The Secret History is a brilliant and suspenseful novel that will keep you guessing until the very end. The novel is a warning tale about the dangers of obsession and the power of evil.

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Table of Contents Goldman Sachs Trading Training Manual

- 1. Understanding the eBook Goldman Sachs Trading Training Manual
 - The Rise of Digital Reading Goldman Sachs Trading Training Manual
 - Advantages of eBooks Over Traditional Books
- 2. Identifying Goldman Sachs Trading Training Manual
 - Exploring Different Genres
 - $\circ\,$ Considering Fiction vs. Non-Fiction
 - Determining Your Reading Goals
- 3. Choosing the Right eBook Platform
 - Popular eBook Platforms
 - Features to Look for in an Goldman Sachs Trading Training Manual
 - User-Friendly Interface
- 4. Exploring eBook Recommendations from Goldman Sachs Trading Training Manual
 - Personalized Recommendations
 - Goldman Sachs Trading Training Manual User Reviews and Ratings
 - Goldman Sachs Trading Training Manual and Bestseller Lists
- 5. Accessing Goldman Sachs Trading Training Manual Free and Paid eBooks
 - Goldman Sachs Trading Training Manual Public Domain eBooks
 - Goldman Sachs Trading Training Manual eBook Subscription Services
 - Goldman Sachs Trading Training Manual Budget-Friendly Options
- 6. Navigating Goldman Sachs Trading Training Manual eBook Formats
 - o ePub, PDF, MOBI, and More
 - Goldman Sachs Trading Training Manual Compatibility with Devices
 - Goldman Sachs Trading Training Manual Enhanced eBook Features
- 7. Enhancing Your Reading Experience
 - Adjustable Fonts and Text Sizes of Goldman Sachs Trading Training Manual
 - Highlighting and Note-Taking Goldman Sachs Trading Training Manual
 - Interactive Elements Goldman Sachs Trading Training Manual
- 8. Staying Engaged with Goldman Sachs Trading Training Manual

- o Joining Online Reading Communities
- Participating in Virtual Book Clubs
- Following Authors and Publishers Goldman Sachs Trading Training Manual
- 9. Balancing eBooks and Physical Books Goldman Sachs Trading Training Manual
 - Benefits of a Digital Library
 - o Creating a Diverse Reading Collection Goldman Sachs Trading Training Manual
- 10. Overcoming Reading Challenges
 - Dealing with Digital Eye Strain
 - Minimizing Distractions
 - Managing Screen Time
- 11. Cultivating a Reading Routine Goldman Sachs Trading Training Manual
 - Setting Reading Goals Goldman Sachs Trading Training Manual
 - Carving Out Dedicated Reading Time
- 12. Sourcing Reliable Information of Goldman Sachs Trading Training Manual
 - Fact-Checking eBook Content of Goldman Sachs Trading Training Manual
 - Distinguishing Credible Sources
- 13. Promoting Lifelong Learning
 - Utilizing eBooks for Skill Development
 - Exploring Educational eBooks
- 14. Embracing eBook Trends
 - o Integration of Multimedia Elements
 - Interactive and Gamified eBooks

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