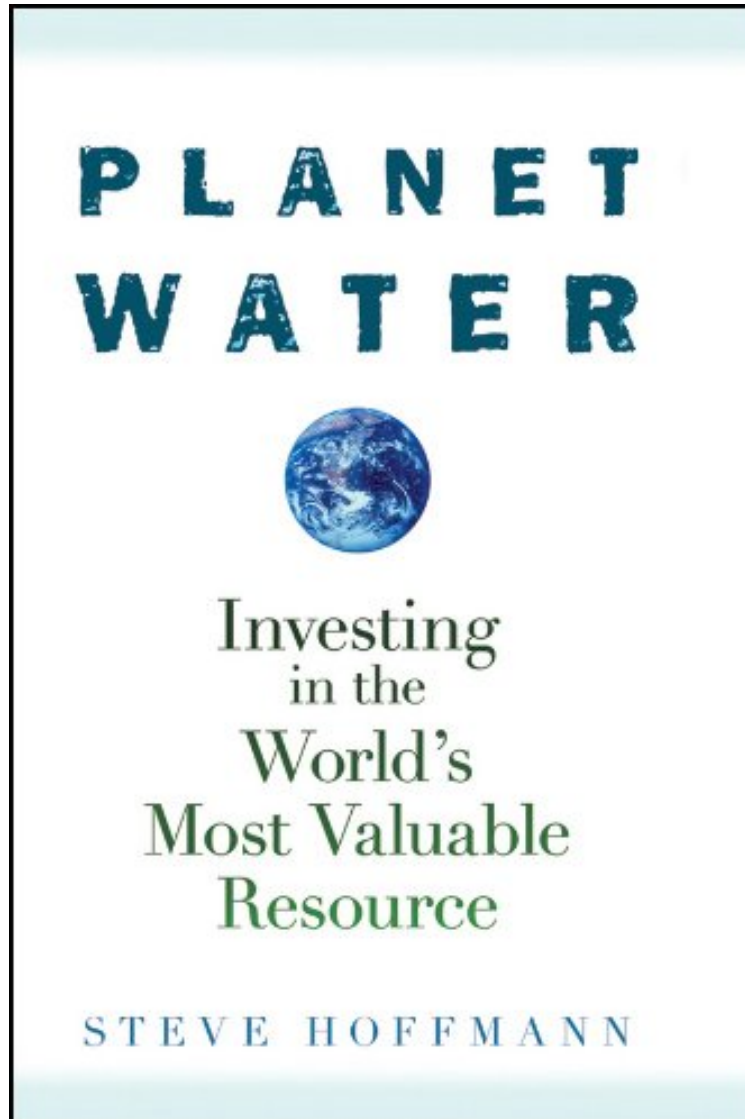


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Planet Water: Investing in the World's Most Valuable Resource

Steve Hoffmann

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Steve Hoffmann : Planet Water: Investing in the World's Most Valuable Resource before purchasing it in order to gauge whether or not it would be worth my time, and all praised Planet Water: Investing in the World's Most Valuable Resource:

13 of 13 people found the following review helpful. Water: A Rising Tide of Investing By R. Parry So how valuable is water? Ponder this: water has no substitute, regardless of price - the only commodity in the world of which this is true. The water industry is enormous; Hoffman says it's the third largest in the world, on par with oil gas and electricity in terms of embedded capital. With over 97% of the earth's water as saltwater, and only 1% is easily accessible surface

fresh water, there is going to be a growing battle for the right to fresh water, and as the Chinese say "Crisis = Opportunity". Hoffman discusses the seemingly cavalier disconnect between the human economy and our dwindling natural resources. This may explain why the water "industry" has not gained popularity with the general investing public when compared to the more traditional and well-followed sectors of our global economy. I found this book helped answer many questions such as; should I buy individual stocks or a mutual fund, which companies are best positioned to address the future, is demand for safe water outpacing supply, what is the global situation and how much new infrastructure will the U.S. need in the near future. I always find it helpful to look at the table of contents, so here are some of the chapters: Chapter 1 - Water Chapter 2 - The Global Water Condition Chapter 4 - The Cost of Clean Water Chapter 5,6,9 - The Business of Water; Utilities; Infrastructure Chapter 12 - Desalinization Chapter 13,14,16 - Emerging Issues; Water as an Asset Class; Looking forward Hoffman says that "virtually every country in the world is presented with some combination of water quality and quantity issues". In tandem with his technical analysis Hoffman also presents his case for the substantial increase in water's value. I learned of a number of additional drivers that have bolstered the argument for water investing. Around the globe, aging and dilapidated water and sewer infrastructure is in dire need of repair, and new infrastructure must be built to meet the needs of growing populations in both developed and developing economies. I've never been a huge stock investor and stick with mutual funds most of the time. I would recommend this book to those self-directed investors like myself who want to further analyze trends in the water industry.

6 of 7 people found the following review helpful. Good Summary, Important Topic
By Loyd Eskildson
Water is the third largest industry in the world and will be driven by a substantial increase in its value during the 21st century, says author Hoffman. In substantiation, he cites the World Health Organization estimate that 1.1 billion do not have access to improved drinking water and 2.6 billion live without proper means of sanitation. Half of all hospital beds are filled with people suffering from waterborne and water-related diseases. The health burden also includes the annual expenditures of 10 million person-years carrying water from distant sources. An estimated 1.8 million deaths occur annually from diarrheal diseases alone. Finally, China has 22% of the world's population, and only 8% of its water. Over 97% of the earth's water is saltwater, and only 1% is easily accessible surface fresh water. If per-capita consumption continues to increase at its current rate we will be using over 90% of available fresh water by 2025. Estimated total global water costs 2008=2025 will be \$16 trillion - includes current operations and expansion according to international goals. Semiconductor makers require lots (up to 1 billion gallons/year/major plant) of ultra pure water - it is estimated that for every \$1 they spend buying water, they spend another \$20 in added purification and \$10 in waste-water pretreatment. Health care, cooling towers, pharmaceuticals, and heavy metal processing also require specially treated water. Global warming will add to the world's water problems due to increased floods and the resulting spreading of fertilizer and sewage; increased drought will be another problem. The rest of "Planet Water" provides a good overview of the various equipment and chemical needs for water purification and waste-water treatment.

3 of 3 people found the following review helpful. depends on your intended purpose
By Kelvin Wong
I bought the book with hopes that it was a beginner's guide to investing in water (whether via stocks, ETS, mutual funds). It was more an informational guide on water's history, purpose/uses, and the science behind getting water to its intended use. There were a few charts regarding certain companies that invest in water, but the book does not drill into these companies and their value as an investment. Bottom line: too much science/history, and not enough investment tools/ideas. I was quite disappointed.

Solving the world's water problems is proving to be one of the greatest investment opportunities of our time. Already, world water supplies are inadequate to meet demand, and the problem is going to get much worse in the years ahead. The World Bank estimates that 1.1 billion people lack access to safe drinking water and about 50 percent of the world's hospital beds are populated by people who have contracted water-borne diseases. If present consumption rates continue, in 25 years the world will be using 90 percent of all available freshwater. To address the problem, trillions of dollars will need to be invested in water infrastructure projects. And while the problems are most acute in developing and rapidly growing economies, there are huge water infrastructure needs in industrialized countries, as well. In the U.S. alone, it's estimated that more than \$1 trillion will be needed for water and wastewater infrastructure projects. In Planet Water, water investment expert Steven Hoffmann explains the dynamics driving the water crisis and identifies investment opportunities in various sectors of the water industry. Hoffman provides investors with the knowledge and insights they need to make informed investments in water utilities, as well as companies providing water treatment services; infrastructure services; water monitoring and analytics; and desalination services. He also discusses mutual funds and ETFs that specialize in water stocks. Investing in the water industry is certainly no pie-in-the-sky idea. Over the past five years, many water stocks have exploded in value and water stocks as a whole have outperformed the SP 500 by a substantial amount. In Planet Water, Hoffmann provides investors with everything they need to profit from this fast-growing industry in the years ahead.

Named a top investment book of the year by the Stock Traders' Almanac 2010. The book . . . might well guide some very satisfactory investments. . . Mr. Hoffmann does an able job of laying out the basics of water scarcity

and delivery, and he presents a persuasive case for water's looming importance, rivaling oil as the most important commodity this century. . . A strong current of the investing advice in "Planet Water" is Mr. Hoffmann's contention that water utilities will move toward privatization and away from government management. Private management will make companies concentrate on core competencies to keep efficiencies high; those companies are the ones for investors to pursue. . . --Wall Street Journal, 5/27/2009

Water, says Steve Hoffmann, will be the resource that defines the twenty-first century--driven by a substantial increase in its value. The water business is already the third largest industry in the world, behind oil and gas production and electricity generation. There is a burgeoning global demand for safe drinking water, environmentally sustainable water use, and industrial process improvement. Trillions of dollars will be spent worldwide on water projects in the coming years, which will substantially elevate the equity values of water-related companies. In fact, from 2000 to 2005, water utility stocks returned 134%, and some individual water utility stocks went up five-fold over the same period. And water utilities comprise just one sector among a number of functional groupings, each of which possess their own unique fundamentals. In Planet Water, Hoffmann, one of the first investors to recognize the value of the water industry as a long-term investment, reveals the details behind this growing opportunity and shows you how to profit from it in the years ahead. The water industry, Hoffmann explains, not only encompasses all aspects of drinking water, but also, in an increasingly significant context, provides water to meet the quality parameters of everything from human consumption to ecological integrity to semiconductor manufacturing to irrigation--and in the quantities necessary to potentially serve a future megacity of a billion people. The combination of need and structure will require expenditures of unprecedented proportions and create an investment opportunity that is only beginning to come to fruition. Dramatic change is on the way--to be reflected in consolidation, rationalization, accelerating merger and acquisition activity, private equity involvement, and a consistent flow of initial public offerings. Planet Water outlines the five key sectors of the industry--utilities, treatment, analytical, infrastructure, and resource management--and reveals what investors can expect to see in the near and long-term future and how they can make the most of this unprecedented investment opportunity. With the rapidly expanding world population, especially in developing economies, as well as increased per capita water demand, an overutilized supply of fresh water, and the fact that water is experiencing growing temporal and spatial constraints, all the ingredients are in place for water stocks to continue to outperform the general market. In fact, Hoffmann believes that water is logically transitioning to a distinct asset class based on the unique characteristics of water as a scarce resource and a vital commodity. Planet Water will show how you too can profit from an investment in the resource of the twenty-first century: water.

From the Back Cover

Praise for Planet Water "Steve Hoffmann has been a contributing editor and Model Water Stock Portfolio manager for our Water Investment Newsletter over the past twelve years. Steve has the education and background in water to understand the dynamics of water and its related sciences. In addition, Steve has the business mind and background to assimilate the two into forecasting investment trends in the water industry. The serious investor who wants to invest in the water market will find this book a must-read to obtain a background in water to help make knowledgeable investment decisions in the water arena." --Tom Bell, President and Publisher, U.S. Water News

"Timely, provocative, and insightful--Hoffmann provides a much needed dialogue on the looming water crisis. He addresses the necessity for change in our mind-set and prepares us for the challenges that lie ahead." --Donna Mathern, Financial Analyst

"Planet Water: Investing in the World's Most Valuable Resource beautifully educates and informs readers on the shifting availability and demand for water. A resource taken for granted by many and nicknamed 'liquid gold' by others, it is clear that global demand is putting tremendous stress on current supply and that there simply is no substitute. Steve Hoffmann goes to the heart of the issue and brings to light the challenges and the opportunities ahead for addressing our most precious resource." --Richard Sootkoos, Managing Partner, Palisades Water Index Associates

"In Planet Water, Steve Hoffmann describes the challenges and opportunities of investing in the water industry from a unique perspective shaped by formal scientific and resource economics training and years of experience consulting with and investing in water-related companies. Regardless of whether he's describing water rate structures, potential technology applications, service solutions, or identifying sector-specific or industry-wide trends, his insights not only advance general understanding of how water permeates every aspect of our lives, but more importantly provide a framework for understanding the relevant investment risks and rewards of the water industry. This book is a valuable resource for investors and industry participants alike." --Christopher Ward, CFA, Independent Investment Analyst, former Chief Investment Officer, CALLC