

DIERICKX LEYS

P R I V A T E B A N K

TOP-2

Werner Wuyts

Verantwoordelijke Studie & Analyse

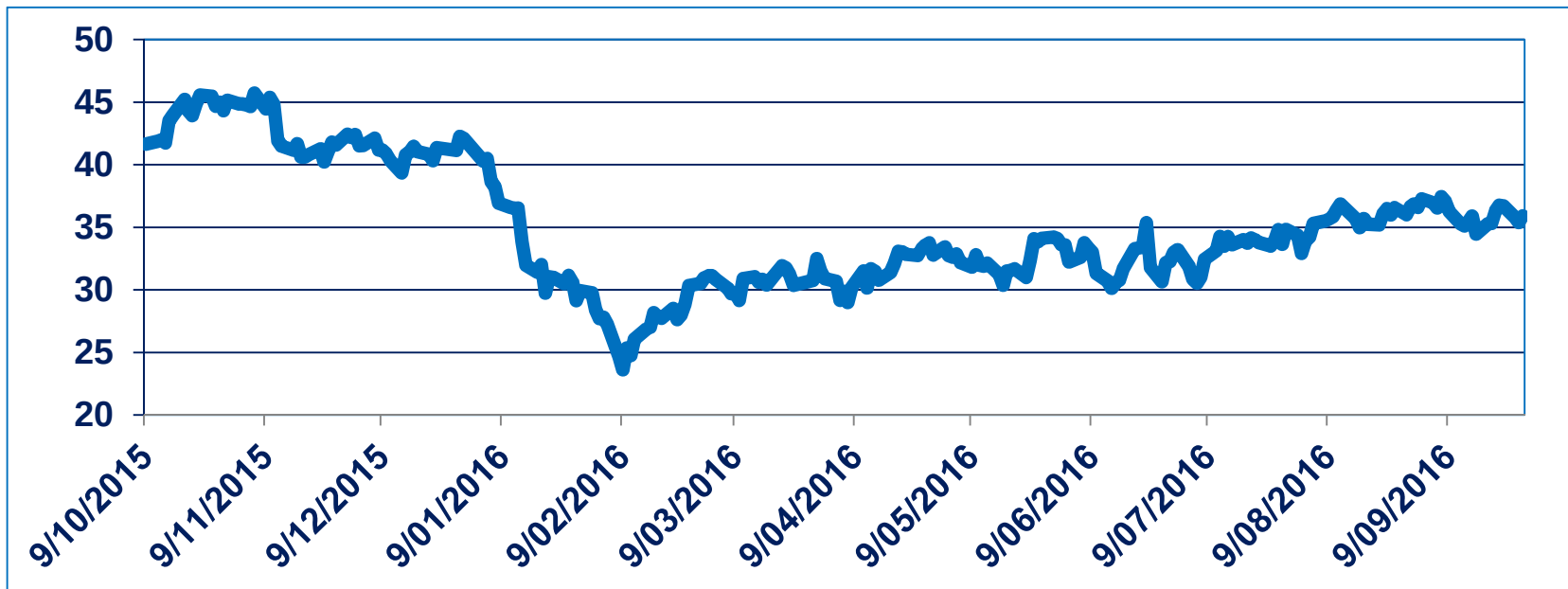
Even achteruitkijken

IMMOFINANZ: - 9%



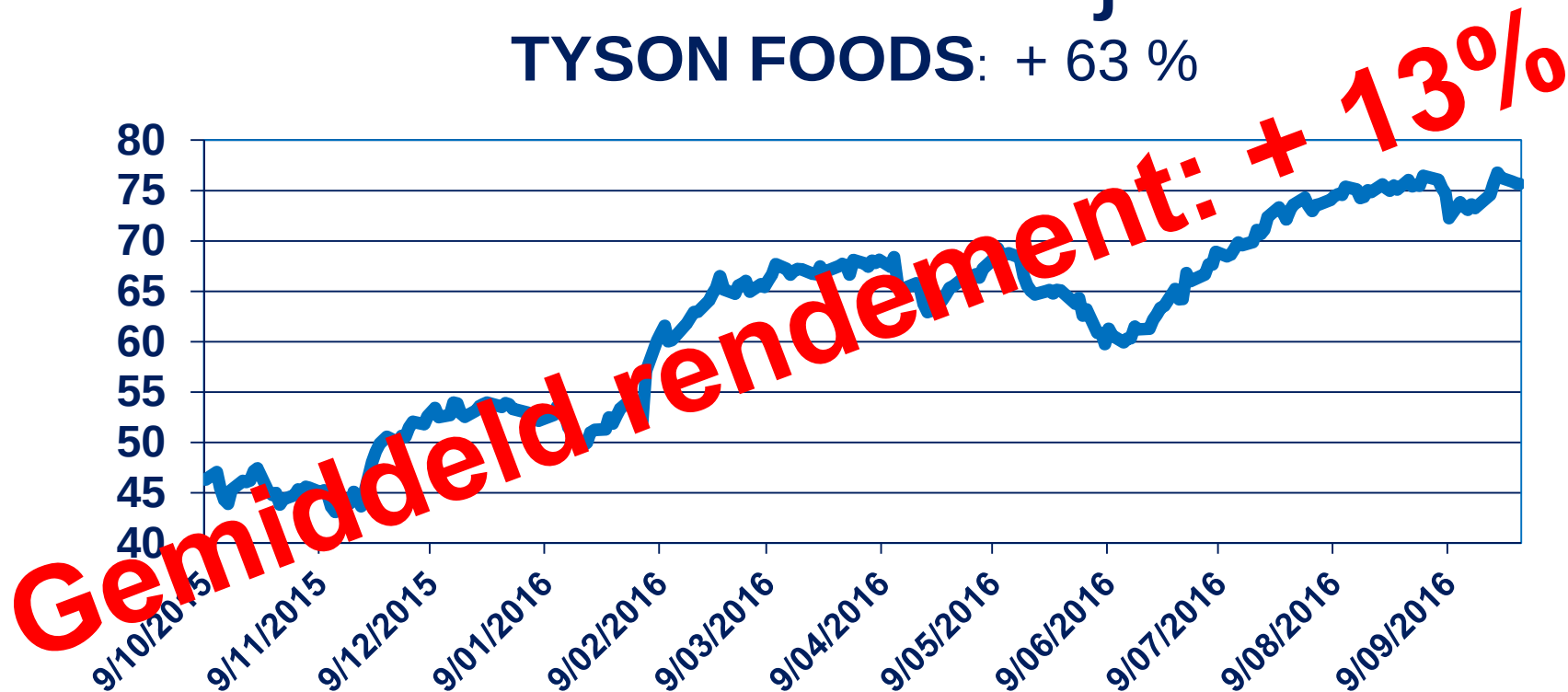
Even achteruitkijken

EXOR: - 14 %



Even achteruitkijken

TYSON FOODS: + 63 %



Criteria

- Bedrijven met een sterke geschiedenis
- Aanvaardbare voorspelbaarheid van de winsten
- Hoge vrije cashflowgeneratie
- Onderschat koerspotentieel

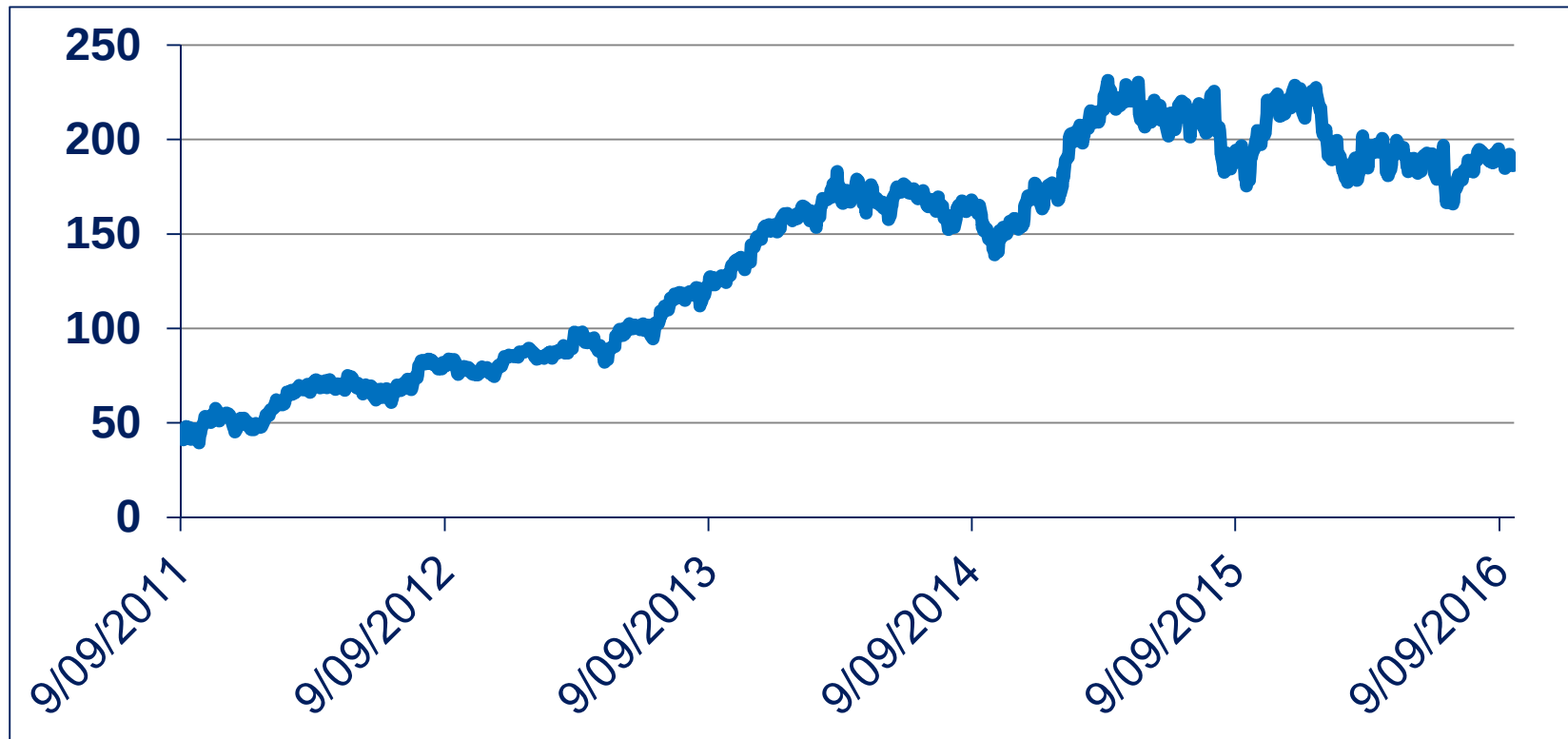
Continental



Tyres - Engineered in Germany.



1. Continental



1. CONTINENTAL

Familiaal bedrijf
Sterk management

Cycliciteit
automotive

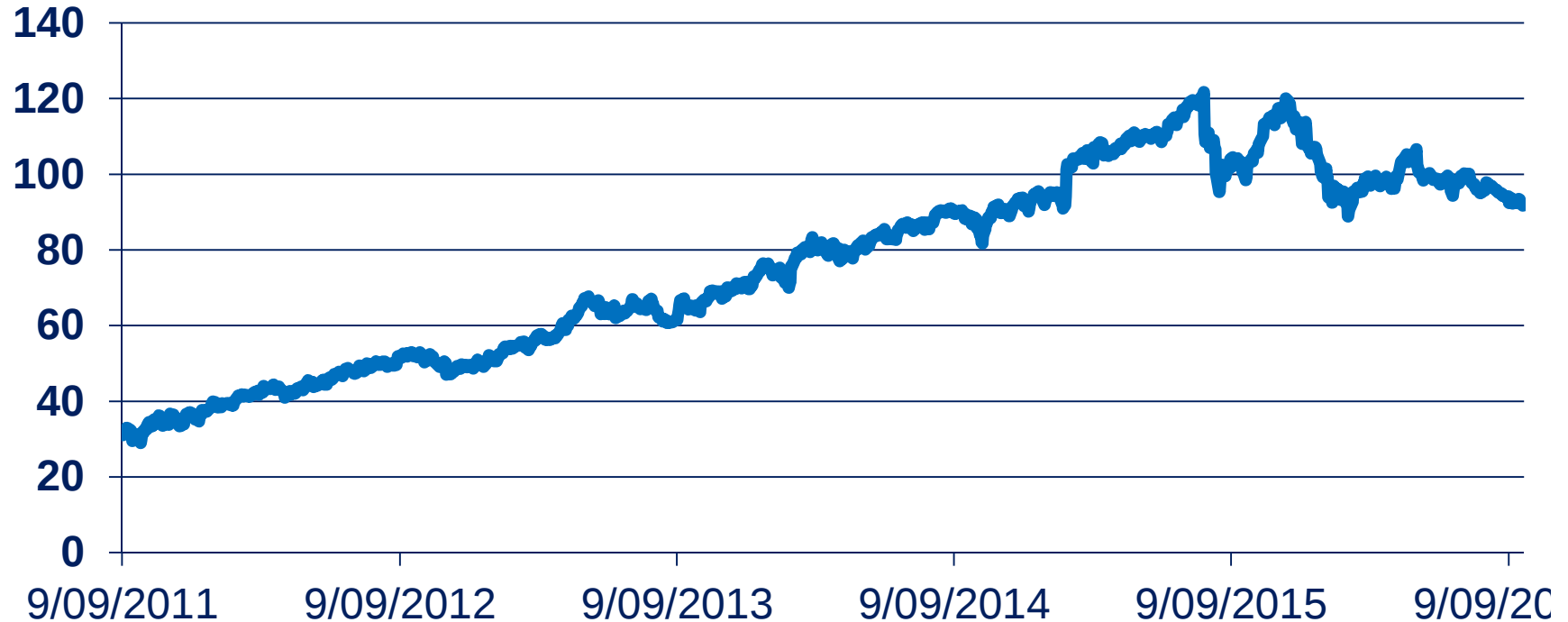
Meer
elektronica

Prijsdruk
autoproducenten

A magical night scene featuring the Disney Castle illuminated with warm lights. A large, glowing shooting star streaks across the dark blue sky, leaving a long, vibrant pink and purple trail. The castle is reflected in a body of water in the foreground. The overall atmosphere is dreamlike and enchanting.

WALT DISNEY
PICTURES

2. WALT DISNEY



2. WALT DISNEY

S
Sterke
merknamen

W
ESPN

O
Meer
elektronica

T
Veranderend
medialandschap

DIERICKX LEYS

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