

## 2014 rich list reaches beyond usual suspects

## 出乎眾人意料的 2014 富豪榜

John Fredriksen and the Ofer brothers are joined by lesser-known shipping investors in the global elite

John Fredriksen 和 Ofer 兄弟以鮮為人知的航運投資人身分榮登此全球富豪金榜。

As Forbes published its annual rundown of the world's billionaires last week, shipping's eyes would have been drawn to the usual suspects from the industry dwelling about the global elite.

在上週富比士公佈年度世界億萬富翁排名後，航運界的眼光被吸引到這些富豪在各項物業投資的推估上。

John Fredriksen at number 76, with a fortune of \$13.6bn, has long been considered one of the world's wealthiest shipowners. Eyal Ofer, at \$7bn, is in 191<sup>st</sup> position and ahead of brother Idan(\$5.7bn) in 244<sup>th</sup> place, which would tracking the separation of their businesses.

有著 136 億美元的身價的 John Fredriksen 排名第 76 名，是長期被公認全球最富有的船東。有著 70 億美元的身價的 Eyal Ofer 排名第 191 名，領先他排名 244 名的弟弟 Idan Ofer(身價 57 億美元)。他們的排名將隨著他們事業分家而變動。

Hapag-Lloyd shareholder Klaus Michael Kuehne – with \$10.4bn and in 113<sup>th</sup> position – will, presumably, have been pleased to be placed ahead of Mediterranean Shipping Co (MSC) magnate Gianluigi Aponte, whose \$6.3bn put him in 215<sup>th</sup> place.

有著 104 億美元身價的赫伯羅特股份有限公司股東 Klaus Michael Kuehne 排名第 113 名，據推測，將會被排在 63 億美元身家，排名第 215 名的 Mediterranean Shipping Co (MSC) 船運大亨 Gianluigi Aponte 之前。

However, there are a few global tycoons showing a larger interest in the industry who may given the stealth effect of the pinstriped suit.

然而，有數位全球富豪想擴大他們在航運業的股份，可能引起一番領班人檯面之下的波濤暗潮。

Top among known shipping investors is George Soros, the legendary finance figure who, just a few weeks ago, was revealed by Forbes as the top-performing hedge-fund manager of 2013.

世界最知名的航運投資人非 George Soros 莫屬。一個活脫的金融傳奇，數週前才剛被富比士表揚為 2013 年最佳避險基金經理人。

Soros, who Forbes says is the 26<sup>th</sup> richest man in the world with \$23bn, finished last year with investments in four shipping companies worth a collective \$15.53m, according to a legal filing by Soros Fund Management. His largest shipping play is an \$8.9m slice in Scorpio Bulkers. He also held around \$4.3m of Safe Bulkers and minimal amounts of Diana Shipping and Navios Maritime Holdings.

Avid readers of TradeWinds may have noticed Michael Dell in 48<sup>th</sup> position on the Forbes list with \$17bn to his name. As TradeWinds reported a couple of weeks ago, the computer magnate has invested \$33m in StealthGas and also sports small slices in Baltic Trading, Paragon Shipping and George Economou's DryShips via MSD Capital.

David Tepper, the number two hedge-fund manager of 2013, also has a taste for shipping. His Appaloosa Management finished last year with shares in Carnival Corp worth almost \$30m. His fortune of \$10bn makes him the 122<sup>nd</sup> richest person on the planet.

Steve Cohen, the man behind SAC Capital, was a surprise third in Forbes's hedge-fund managers list. Cohen, who was burned for insider trading last summer, still has \$11bn to his name, leaving him as the 106<sup>th</sup> richest person in the world.

His shipping interests were worth almost \$40m at the end of last year, US Securities and Exchange Commission (SEC) filings show. His largest investment was in Royal Caribbean but other notable holdings include Golar LNG and

George Soros, 富比士表揚有著 230 億身家的全球第 26 名富豪, 在去年剛完成他透過索羅基金管理顧問公司 (Soros Fund Management) 在四家航運公司中總值 1553 萬美元的合法投資。他最大的航運持股是在天蠍貨運 (Scorpio Bulkers) 的 890 萬美元。他也持有大約 430 萬美元安全貨運 (Safe Bulkers) 的股份和小量在黛安娜船運 (Diana Shipping) 和納米歐斯海事公司 (Navios Maritime Holdings) 的持股。

長期關注本報的讀者可能已經注意到了這個名字, Michael Dell, 擁有 170 億美元身家, 富比士排名 48 名的富豪。像本報數週前報導的, 這位電腦界鉅子已經在迅運天然氣 (StealthGas) 投資了 3300 萬美元, 並透過 MSD 基金 (MSD Capital) 操作了少量在波羅的海運 (Baltic Trading)、模範船運 (Paragon Shipping) 與喬治經濟乾貨船運 (George Economou's DryShips) 等公司的持股。

David Tepper, 2013 年富比士表揚為避險基金經理人第二名, 也對航運業有興趣。他的阿帕羅莎管理顧問公司 (Appaloosa Management) 剛完成對嘉年華股份有限公司 (Carnival Corp) 價值 3000 萬美元的控股。他擁有的 100 億財富讓他成為這個地球上排行第 122 名的富翁。

Steve Cohen, SAC 基金 (SAC Capital) 的幕後操盤手, 出乎意料的他是 2013 年富比士評選避險基金經理人的第三名。他才在去年夏天因為他的內線交易飽嚙苦果, 但依然有著高達 110 億元美元的身家, 讓他穩坐世界富豪榜的第 106 名。

美國證券交易委員會 (US Securities and Exchange Commission, SEC) 截至去年底的資料顯示他在船運界擁有價值 4000 萬美元的股份。他最大的投資在皇家加勒比 (Royal Caribbean), 還有其他較多的持股包括古拉液

Kirby Corp.

Oaktree Capital kingpin Howard Marks may be among the world's largest shipowner without knowing it, as TW+ reports today. However, he is far from the richest man in shipping. His \$2bn fortune is less than other Forbes mainstays Helmut Sohem of BW Group (\$2.6bn), Kjell Inge Rokke (\$2.5bn) and Spiro Latsis (\$3.2bn).

York Capital has grown in the shipping consciousness in the past year, with high-profile interests in Scorpio. And as of a couple of weeks ago, it is the largest outside investor in Euronav at 11.78%.

York chief James Dinan is level-pegging with Marks of Oaktree in the Forbes rich list. US Securities and Exchange Commission (SEC) filings show York has an investment of over \$250m in shipping even before the Euronav shares are factored in. Scorpio Tankers is its largest play at over \$120m. It also has almost \$30m-worth of shares in Costamare, more than \$15m in StealthGas and a \$6m slice of Teekay Corp, in addition to hefty chunks of Norwegian Cruise Lines and Royal Caribbean.

化天然氣船運公司(Golar LNG)與克比股份有限公司(Kirby Corp.)。

在本篇報導中，橡樹基金(Oaktree Capital)的當家 Howard Marks 可能是世界大船東中最沒沒無聞的一個。然而，他離航運界龍頭還遠的很。他擁有的 20 億美元身家比其他富比士富豪榜的常客如 BW 集團(BW Group)的 Helmut Sohem(26 億美元)、Kjell Inge Rokke(25 億美元)和 Spiro Latsis(32 億美元)還少。

約克基金(York Capital)在去年開始注意到了航運業，有著眾所皆知在天蠍貨運(Scorpio Bulkers)的持股。並且在數週之前，它以 11.78% 的持股成為了歐洲海運(Euronav)的最大外部投資人。

約克的總裁 James Dinan 和橡樹基金的總裁 Marks 在富比士富豪榜可說是長年勁敵。美國證券交易委員會(US Securities and Exchange Commission, SEC)數據顯示約克基金在投資歐洲海運之前在航運界就有總額超過 2 億 5000 萬美元的投資。天蠍油輪(Scorpio Tankers)是其最大的投資，總額超過 1 億 2000 萬美元。其中也包含在克斯阿瑪(Costamare)約 3000 萬美元的股份、在迅運天然氣(StealthGas)超過 1500 萬美元的股份以及梯開股份有限公司(Teekay Corp.)的 600 萬美元持股。另外他們也是諾威根航運(Norwegian Cruise Lines)與皇家加勒比(Royal Caribbean)的主要股東之一。

詹沅蓉 譯