

MANAGER PICKS: JOHN VARGHESE

By Financial Post

Financial Post, July 25, 2008

John Varghese, co-owner and managing partner of VentureLink Group of Funds, primarily invests in privately owned alternative energy and technology companies in business for five years or greater. The fund is designed for investors looking for an alternative asset to complement their portfolio.

One of the few publicly traded stocks in the fund is Ottawa-based tech company DragonWave Inc. (DWI/TSX).

"Their fundamentals are good and they keep showing sequential growth so it makes sense to keep following it," he said, noting DragonWave just reported revenue growth of 24% for the first quarter of fiscal 2009.

Although they are not held in the fund, Mr. Varghese likes Explorator Resources Inc. (EXO/TSX-V) and Corridor Resources Inc. (CDH/TSX)

Of Explorator, the manager said drilling continues to be successful at its copper-gold projects in South America. But the share price, he adds, does not reflect the company's positive fundamental developments, offering an opportunity for investors to get in.

He said Corridor, whose projects are based in eastern Canada, just made a new discovery in the Frederick Brook shale zone that if successful, will be "enormous" given the company's extensive land position in the prospective area.

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