

于盈眼中的投资策略家索科洛夫：按照自己希望的方式去生活

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按照自己希望的方式去生活

Investment Strategist Kiril Sokoloff: Live the Way You Want

Carol Yu, November 21

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文 / 于盈

在大概大半年前认识了 [13D 研究公司](#)的创始人、投资策略家[克里尔·索科洛夫 \(Kiril Sokoloff\)](#) 之后，他就会时不时给我发一些他写的报告，我们也会就不同话题有所讨论，逐步增进了解。我发现他的[知识非常渊](#)

博，覆盖面也非常广，他写的《每周感悟》（《What I Learned This Week》）读者遍布全球各地，从时政社会和经济趋势、科技，到个人健康、历史、文学、人生哲学等都有所涉猎。

By Carol Yu

I first met investment strategist Kiril Sokoloff, the founder of 13D Global Strategy & Research, about half a year ago. Since then he has been sending me some of his publications from time to time. We would have discussions over different topics. In this process, we have gotten to know each other better. I was amazed to find that he possesses a vast store of knowledge about a wide range of areas. “*What I Learned This Week*” published by Kiril and his team has a worldwide audience and covers everything from political and economic trends, technology, to health, history, literature, and philosophy of life.

1

对历史的研究帮他发现机遇

索科洛夫擅长于捕捉推动未来市场的**重大驱动性因素**，和发现大趋势的起点和终点。他的想法和判断很多时候都是**非主流的**，但又是**正确的**。他认为对历史的研究非常重要，自己能看到许多重大机遇，都归功于他对**历史周期的理解**。

Study of history helps him identify opportunities

Sokoloff has a genius for capturing major drivers of the future market and identifying the beginning and end of big trends. His ideas and judgments are often different from the conventional wisdom, but turn out to be correct. He believes that the study of history is very important. A lot of great opportunities he saw is attributable to his understanding of the historical cycles.



他的阅读量极大，一个星期至少阅读 4-5 本书。我去到他香港的家，看到他家里所有的凳子、桌子上摆满了各种阅读材料和文档。他真是抓紧每一分钟都在阅读，也已经写了 6 本书。

He is a voracious reader who reads at least four to five books a week. I went to his home in Hong Kong and saw all the chairs and tables covered with

reading materials and documents. He is really seizing every minute to read and has authored six books.

2

长期的幸运都是源于积累

他一直强调自己非常幸运，拥有很好的直觉。但在我看来，人生中一次两次幸运是可能的，但如果几十年下来都“幸运”的话，那必是源于长期的积累，所谓幸运只留给有准备的人。我想，正是因为他丰富的知识储备，正是因为他可以沉下心来思考，正是因为他忠于自己的想法、不盲目追随主流，才让他拥有这种所谓的直觉和幸运，也让他可以站在一定的高度看事情的发展，致力于发现“下一个大趋势”。

Long-term luck comes from persistent efforts

He has always stressed that he is very lucky and has a good sense of intuition. But it seems to me that it is possible to be lucky once or twice in life, but if you are “lucky” for decades, it must be the result of persistent efforts. This is because fortune favors the prepared mind. I think it is his rich knowledge, his ability to think calmly and stick to his ideas, and unwillingness to follow the crowd that help him have such intuition and luck. It also allows him to view things from a vantage point and identify “the next big thing”.

虽然他是一个非常成功的投资战略家，拥有很多**大客户**，经常全世界到处飞，但是感觉他的生活丝毫不**忙乱**。他认为每天**坐在办公室里 8 小时**和把时间花在**智能手机**上是生命中**最无益**的举动。

Kiril is a very successful investment strategist with many big clients. He has to spend much time travelling around the world. But it seems to me that his life is not hectic at all. He believes that sitting in the office for 8 hours a day and spending time on a smartphone are the most futile things in life.

3

按照自己的方式生活

女儿们在家上学

他按照自己希望的方式去生活，把自己的生活安排得**井井有条**，也立下了一些不能去打破的规则，比如说每天一定要**陪伴家人**、**午休**、**运动**。过一段时间，也会逃离去一些怀抱大自然的地方去**静修**，让他可以**排除杂音**，静下心来思考。

这是他的一天时间表，简直就是过着“**天堂般**”的生活！

Live the life he wants

Home schooling his daughters

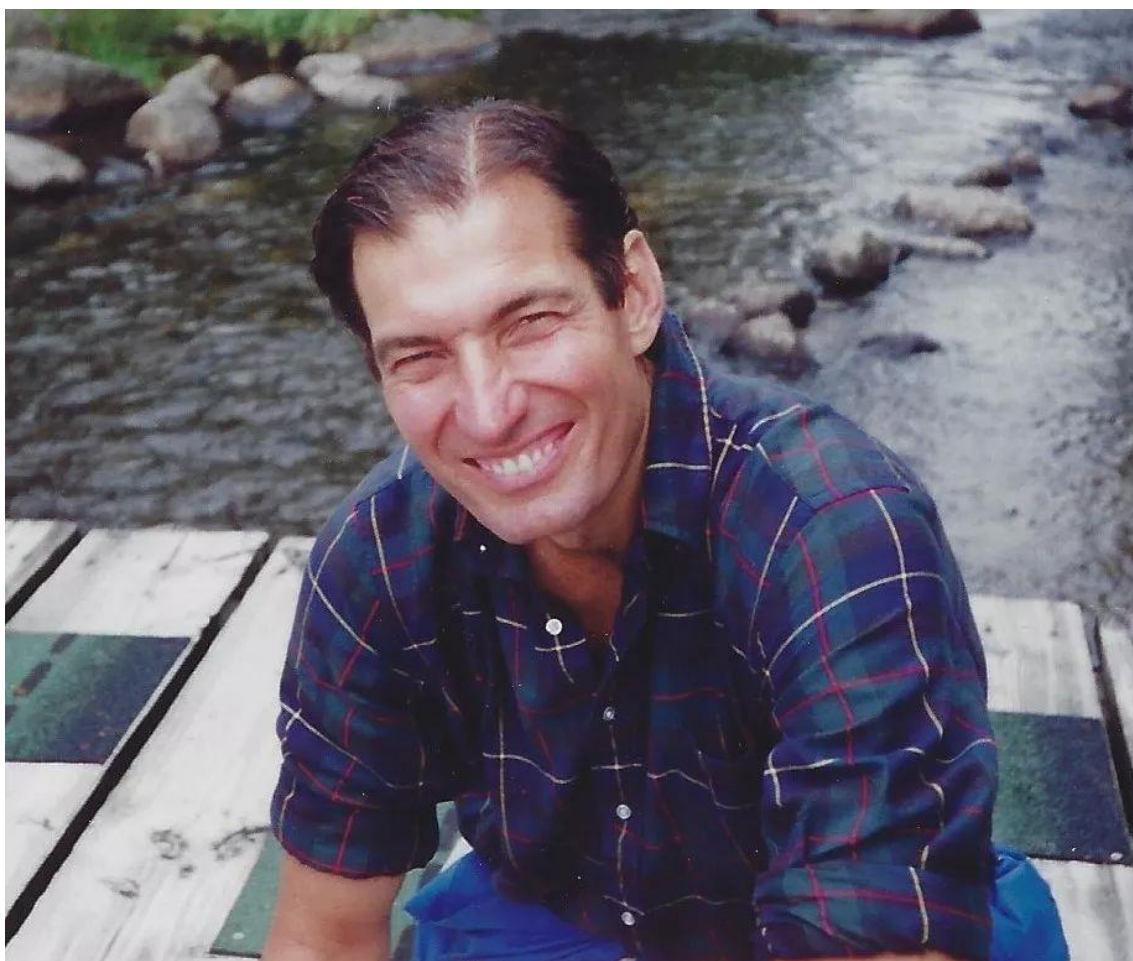
He lived the way he wants, arranges his life in perfect order, and makes some rules that cannot be broken. For example, he spends time with his family, has lunch break, and takes exercise every day. From time to time, he

will go on a retreat in nature, which allows him to filter out the noise and think quietly.

His daily schedule is shown below. It seems to me that he is leading a heavenly life!

他一般都会早起，和女儿两个打一会枕头大战再去工作，他在家工作，在家有个办公室。他每天早上全神贯注工作 4 个小时，在四个小时里做十二小时的工作。然后跟女儿们吃午饭，然后午睡。醒来以后回到办公室再工作半小时，然后去健身房锻炼两小时，之后会再去海里游泳半小时，回来跟女儿们一起游泳半小时，在房子里和她们打闹一阵。送女儿们睡觉之后，他会开始读书。然后在 1 点半左右上床睡觉。

He usually gets up early, and has a pillow fight with his two daughters before setting to work in his home office. He concentrates on his work for four hours every morning and does twelve hours' worth of work in four hours. Next, he has lunch with his daughters and then takes a nap. After he wakes up, he goes back to the home office and works for another half an hour. Then he goes to his home gym for exercise for two hours. He goes to the sea to swim for half an hour before going back to swim with his daughters for half an hour and playing with them in the house for a while. After getting his daughters to sleep, he starts reading before going to bed at around 1:30.



索科洛夫的**勇于做少数派、敢为人先**也体现在对孩子教育的态度上。他大胆地选择让他的一对女儿，不去正规学校接受教育，而是**在自己家学习**（home schooling）。这可是一项十分吃力的工作。但他觉得只有这样才能让他的孩子保有**对学习的热情**，更好地培养他们的**创新能力**和在未来世界中立足所需要的**价值观**，更能跟上时代发展的步伐。

Sokoloff does not have any problem with being alone in his decision. This is also manifested in his attitude towards the education of his children. He boldly chose to home school his two daughters instead of sending them to a regular school. This is a very difficult job. However, he feels that only in this way can his children maintain their enthusiasm for learning, better develop

their innovative ability and the values they need in the future world, and help them keep pace with the times.



世界即将经历巨变，但他和身边的朋友讨论，大家教育孩子的方式**几乎没有改变**，这就代表我们已经跟不上时代发展的步伐。他希望从自己家庭开始，可以更好地帮助孩子们为这个**人工智能大行其道的世界做好准备**。他便是这样一个从自己做起的**行动派**。

The world is about to see great changes, but he found that the way people educate their children has hardly changed. This means we are falling out of step with the times. He hopes to start from his own family and get his children prepared for a world where artificial intelligence will prevail. He is indeed a man of action.

最希望女儿能自律

有同情心同理心

索科洛夫说，他最想传达给女儿们的价值观是**自律**，这也是他的父亲当年告诉他的。一个人只有先**对自己守信**，才能对别人守信。互联网时代削弱了人们的自律能力，很多东西变得唾手可得，人们不再懂得等待了。还有，他认为**同情心、同理心**和**评价他人的能力**，可以拥有**承受真正严峻挑战而永不放弃的内在力量**也非常重要。

Self-discipline, compassion, and empathy are what he wants the most to instill in his daughters

Sokoloff said that self-discipline is the most important value he wants to teach to his daughters. He learned it from his father when he was young. One cannot keep his words to others unless he keeps his words to himself. The internet has weakened our self-discipline. Many things have become so easy to get, and people no longer know how to wait. Also, he believes that it is also crucial for us to have compassion, empathy, the ability to evaluate others, and have the inner strength to never give up amid real challenges.



索科洛夫有一个训练女儿获取这些能力的方法，就是带她们去爬**险峻的高山**。他笑说，他的朋友简直不敢相信，他带着三岁的孩子去爬一千多米的山。他还带着孩子去**周游世界**，去深入到不同的社区，他认为很重要的是带着一颗**开放且谦卑的心**去尝试了解他人和他国的出发点和思维，去和别人交流、建立友好关系，去学会**奉献和给予和帮助他人**。

Sokoloff helped his daughters to acquire these abilities by taking them to climb steep mountains. He said that his friends couldn't believe that he would take a three-year-old child to hike a mountain of more than 1,000 meters. He also took his children to travel around the world to engage with different communities. He thought it was important to try to understand other people and countries from their perspective with an open and humble heart, interact and build close relations with others, and learn to give and help others.

索科洛夫认为，灵活性、适应性、谦逊的态度、热情很重要，这些让你可以在人生的路上一直走下去，走很远。索科洛夫引用达尔文的话说，“存活下来的往往不是那些最强壮的、最聪明的人，而是那些适应力最强的人。”

Sokoloff believes that flexibility, adaptability, humility and passion are important, which allow you to keep walking down the path of life. Sokoloff quoted Darwin as saying, *“It is not the strongest species that survive, nor the most intelligent, but the ones most responsive to change.”*



而他告诉我，现在正策划写一本小说，一本能在目前这个世界中展现人性之美，包括同情、宽容、牺牲、爱等品质的小说。他认为，自己有职责去提醒人们人性之美，也希望自己的为人和生活可以体现这些品质。

He told me that he is now planning to write a novel, which can show the beauty of humanity in the current world, such as compassion, tolerance,

sacrifice, and love. He believes that he has the responsibility to remind people of the beauty of human nature, and he hopes that his own characters and life can manifest these qualities.