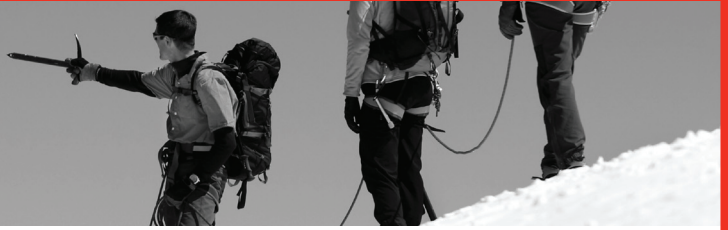


Advisory Managed Service Specialist Services



At a Glance

- ▶ Retain control of investment decisions
- ▶ Direct consultation with your personal Investment Manager and support team
- ▶ Access to our world-class investment specialists and recommendations
- ▶ Build your portfolio from a wide range of asset classes from conventional to alternative
- ▶ Comprehensive reporting

Overview

We recognise that many of our clients prefer to retain control of each decision in their portfolio. That is why we offer a dynamic advisory managed investment solution.

The Advisory Managed Service enables you to keep control of decisions governing your portfolio, while at the same time giving you access to the guidance and impartiality of our investment strategists and HSBC's global research capability.

Your dedicated Investment Manager will listen closely to you to understand exactly what you are hoping to achieve through your investments and identify the service which most meets your needs. As well as offering initial guidance on your investment strategy, your Investment Manager will contact you throughout your investment journey with suggestions and recommendations that correspond to your objectives. We encourage regular meetings to review your portfolio and discuss future strategy.

The service offers worldwide geographic and sector coverage, a choice of currencies and advice across all the main investment vehicles, all supported by a comprehensive reporting package.

Highlights

Partnership – By building a long-term trusted relationship, we will work closely with you to build a portfolio and identify a benchmark which reflects your personal preferences. Together we will agree how involved you would like us to be, whether that means leaving structuring and asset allocation of your portfolio to us, or investing in strategies which are not suited to a discretionary approach.

Global Expertise – Receive unprecedented insight and access to the markets through our team of specialists, covering global and sector investment. The team provides comprehensive coverage of investment trends, to create the best possible strategies to meet your requirements.

Comprehensive Research & Reporting – The service is supported by a detailed reporting package offering performance analysis, portfolio valuations, Internet access to your portfolio and regular investment reports.

Investment Process

Our approach to investment management is research driven and follows a disciplined process in the search for value in markets and securities. Our team of investment strategy specialists from around the globe determines, on a monthly basis, the outlook for asset classes, together with factors affecting the geographic regions in which we invest. These preferences are then implemented in our portfolio strategies which serve to guide our investment team.

With the assistance of research produced by our analysts and other well-known investment houses, the sector and product specialists draw up recommendations that your Investment Manager will use to help you to tailor your portfolio to meet your chosen objectives.

Contact Us

To learn more, speak to your HSBC Relationship Manager or contact us at:

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