Customised Portfolio Management Service

At a Glance

- Actively managed portfolio
- Aims to maximise returns achievable within your individual risk profile
- Diversified, multi asset portfolio service
- Lower dependence on individual asset class; combination of conventional and alternative asset classes
- Customised benchmark approach
- Regular portfolio reviews to adjust and adapt the portfolio requirements to your needs

Overview

The Customised Portfolio Management Service is a progressive approach to investing where portfolios are designed to genuinely meet your specific investment needs.

We listen closely to you to understand exactly what you are hoping to achieve and the level of risk that you are prepared to accept to meet those goals. Through working with you, we develop a detailed understanding of you, your tolerance to risk and your investment time horizon. We use your attitude to risk to guide how your money is invested and then recommend a solution designed to match your goals and changing circumstances.

Your selected portfolio aims to maximise the returns achievable within your chosen risk profile.

The multi-asset portfolios use a combination of both conventional and alternative asset classes. Regular portfolio reviews are undertaken to adjust and adapt the portfolio objectives to your needs.

The service uses customised benchmarks, rather than standard industry benchmarks. Therefore, we have the freedom (where appropriate), to invest in a wider range of investment instruments than may normally be used.

The Customised Portfolio Management Service is offered to customers with investments of more than £500,000 (or equivalent in Euro/Dollar) and is provided in Sterling, Dollar and Euro currencies.

Highlights

Understanding your requirements – Through our risk tolerance questionnaire, we use sophisticated analysis to design a long term strategy to match your profile, based on a thorough evaluation of asset class volatility and returns.

Leading edge investment techniques – We bring you leading edge investment techniques to get the very best out of your investments. The Customised Portfolio Management service provides you with access to many different types of both mainstream and alternative investments – some of which are not easily available to the private investor.

Risk and Return – Sophisticated analysis of risk return characteristics enable us to identify possible portfolios with the highest level of historic return for any level of historic risk. A skilful combination of investments with different risk/return characteristics can make a significant difference to performance.

Flexibility – As a flexible service, your investment strategy can be modified over time to keep pace with your changing circumstances. Investment in a wide range of investment instruments means you benefit from a greater diversification of risk.

Investment Process

Once we have determined the best long term framework for your portfolio, your investments are managed on a daily basis. You have the reassurance of a disciplined investment process with in depth monitoring and controls.

Contact Us

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

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