

DISCRETIONARY PORTFOLIO MANAGEMENT SMART MANDATES

A NEW PORTFOLIO MANAGEMENT EXPERIENCE

SMART mandates are an exclusive and innovative approach to portfolio management.



YOUR NEEDS



OUR SOLUTIONS

I wish to generate income when interest rates are low

SMART GLOBAL INCOME

I wish to generate yield with a bond portfolio without worrying about rising interest rates

SMART FIXED INCOME

I wish to minimise the adverse effects of unpredictable volatility shocks on my portfolio

SMART VOL

I wish to protect my financial instruments against negative interest rate.

SMART YIELD

I wish to adjust my portfolio to my specific requirements for risk and return

SMART ALLOCATION

THE DIAGNOSIS: A MILESTONE TO BUILD A PORTFOLIO ADAPTED TO YOUR NEEDS

Managing your portfolio starts with an exchange of information to ensure that we understand your investment needs and objectives. If the level of risk remains in the very heart of that diagnostic, both your aspirations and sensitivity in front of events which might impact your portfolio are also discussed and represent a key element to build and then, manage the adapted portfolio.

EXCLUSIVE SERVICES

PRE-INVESTMENT ANALYSIS

Analysis of your existing portfolio(s) before making the first investment

Advice on the consistency of your existing investments with your goals

CURRENCY MANAGEMENT

Management of your unique currency exposure beyond the standard range of currencies.

Portfolio setup taking into consideration your currency assets and liabilities in other countries.

TRANSPARENCY & COMMUNICATION

Personalised communication with regular feedback and performance reports

Possible reporting in various languages

ACCESS TO THE EXPERTS

Personalised communication with our experts for regular feedback and performance reports

Travel on demand to meet you in your home country

CUSTOMISED BENCHMARK

Portfolio constitution targeting specific benchmarks

Portfolio implementation that can follow a variety of replication techniques

LOAN FACILITY

Access specific financial solutions such as Lombard Credit: based on the financing value of the pledge of your holdings you access an overdraft facility or a fixed-term advance

INCOME MAXIMISATION

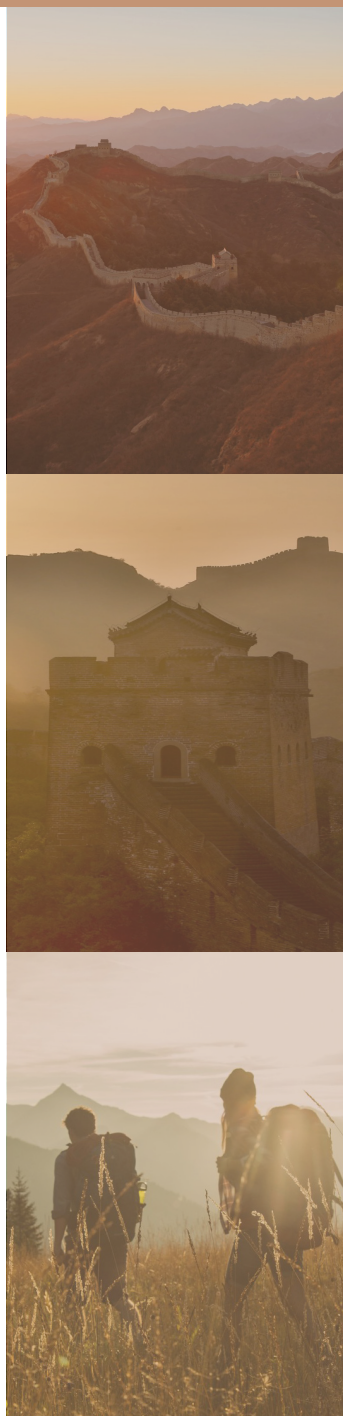
Mandates focused on income generation

Possibility to adjust portfolios to favour either current income generation or capital growth

CUSTODY SERVICE

Custody offering is also available for client assets with external managers

Extensive experience in managing client portfolios held by external custodians



CONTACT YOUR PRIVATE BANKER
FOR FURTHER INFORMATION

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