

Finding investment solutions for challenging markets

Amid highly-challenging markets, product manufacturers and distributors urgently need to get clients to use a broader range of portfolio and investment solutions. In particular, diversification and risk management are critical.

In today's uncertain and volatile investment environment, listening to clients to understand their needs and present diversified portfolio solutions to them will differentiate the winners and losers.

Indeed, against the backdrop of what seems to be the toughest year for a long time for wealth managers to make revenue – product manufacturers and distributors must guide clients to use a broader range of investments which are simpler, more suitable and relevant.

In line with this, we designed and hosted our new-format, investment-focused event in Hong Kong in September 2016.

This brought together 260 senior individuals – including leading product & fund gatekeepers from the top international and local Private Banks, Retail

Banks, Multi-Family Offices and IFAs, as well as relationship managers and investment advisers from the industry.

There are clearly many uncertainties in today's investment markets – ranging from individual economies to geo-political issues to interest rates, and more. As a result, the focus needs to be on diversification of risk and rebalancing portfolios. At the same time, it seems that whatever assumptions people have about the past might not be relevant for the future. Advisers therefore need to question their assumptions before building portfolios for their clients.

An important consideration when managing portfolios today is also to continue to move in the direction of removing the responsibility for making investment decisions from the end-

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clients to the investment specialists – whether via a discretionary portfolio management (DPM) model or another format.

Advisers also need to re-align client expectations in terms of returns and performance with what the market is actually offering.

It seems that outcome-oriented investments is the new name of the game. Increased certainty and visibility has the most appeal today. Further, clients don't like prepared product pitches. They want someone that asks the right questions, understands their needs and provides relevant solutions. ■





Adam Cowperthwaite
Citi Private Bank



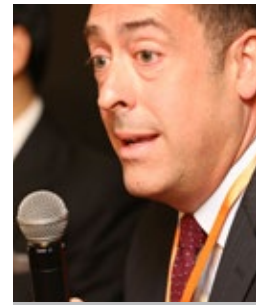
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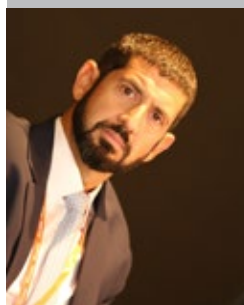
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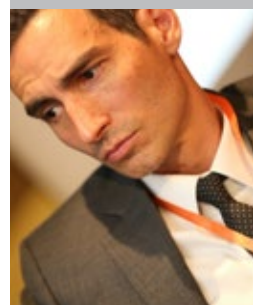
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“Today was outstanding for providing candid and genuine insights into markets, as well as thinking about how private banking is transforming and how to add value to our clients. The discussion about a needs-based, solution-oriented way to enhance client portfolios was also really important.”
Michael Levin, Head of Asset Management, Asia Pacific, Credit Suisse

