

Marc Rey: Pioneering Financial Innovation at Chartered Investment

Marc Rey, the Head of International Coverage Singapore for Chartered Investment, is spearheading the firm's global expansion with a focus on innovative financial solutions. Chartered Investment, a German fintech powerhouse, has been making waves in the financial engineering sector for over a decade. With operations in Germany, Luxembourg, Switzerland, and Singapore, Chartered Investment is known for its role as an infrastructure provider, solution finder, and transaction facilitator.

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BY:

MARC REY

Head of International Coverage Singapore
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A FinTech Powerhouse: Chartered Investment in a Nutshell

Chartered Investment has positioned itself as a leading player in Financial Engineering, providing cutting-edge technological platform solutions essential for the global financial industry. With platforms like OPUS, LIXX, Instifolio, and E-Sec, Chartered Investment offers solutions for securitization, index computation, marketing and implementation of trading strategies, and blockchain technology for securities tokenization.

The firm, founded in 2013, has a robust track record, with over 100 B2B clients, 1,000+ securitizations, \$5+ billion securitized assets, \$500+ million funded venture capital. The team consist of more than 50 employees, mostly with a background in investment banking, legal, trading or asset management, accumulating years of experience in structuring and managing investment products.

As part of the international private equity group Chartered Group in Japan, Chartered Investment is at the forefront of financial innovation.

Marc Rey's Journey with Chartered Investment

Previously leading the Private Banking & Family Office Solutions team within Global Markets at HSBC, Marc saw the potential for more personalized solutions beyond the standardized offerings of international investment banks. His path intersected with Chartered Investment's success stories, drawing him to the firm's vision and leadership.

His move to Asia marked a pivotal moment, aligning with Chartered Investment's plan to build the Asian business. Marc's wealth of experience in building the UHNW (Ultra-High-Net-Worth) business out of Global Markets at HSBC positioned him well for the challenge. Since joining Chartered Investment in August 2019, Marc has been instrumental in the firm's success in Singapore. His achievements include building a profitable and scalable business, expanding the global partner network, and making trading in Chartered Investment's instruments more accessible.



MARC REY

Chartered Investment

Exploring Asia's wealth management community

"Our vision for Singapore was to bring the European success story to Asia and leverage our existing business model with a focus on the local market," Marc explains.

He also remarks that since he started building the Singapore-based business for Chartered in 2019, he has had to learn to adapt to local market conditions and nuances. "I have had to learn to adapt to the local scene, and I am continually working to educate local players about the benefits of opening their architecture to new possibilities like the platforms we offer," he reports.

Local knowledge

He explains that there are some key differences between doing business in Singapore and Europe, especially Switzerland. "The Singapore and indeed Hong Kong markets are dominated by private banks, whereas in Switzerland, there are more EAMs. And we find that in Asia, clients tend to have a more personal relationship with their individual banker, whereas European clients often have a closer relationship with the bank itself. But all that presents an opportunity as the EAM market is growing and we are able to build our relationships here and further afield in Asia."

« “We perceive ourselves not solely as an infrastructure provider, but also as a solution finder and transaction facilitator. For more intricate transactions, our team of experts will guide you through the complete process, from conceptualizing the product to creating a fully tradable security.” »»

He expands on this, noting that although Asian clients generally prefer advisory-based mandates, the EAMs and MFOs tend to have more DPM mandates.

Many nuances and different drivers for growth

Chartered Investment’s offering is increasingly relevant to the expanding EAM and MFO community in Asia, Marc states. Many of these firms have a relatively small number of HNW and UHNW clients and often with their AUM vested in discretionary mandates.

“This means those wealth firms actually have the flexibility as decision-makers to create some interesting products for their clients that can significantly enhance their broader portfolios in a number of different ways,” he says.

He elaborates on the scope of their offering. “It is important for the wealth community to understand that we do not cross any lines in the sand towards advising clients on their products in any shape or form,” he says. “We are the infrastructure provider and solution finder to help them achieve their vision.”

Building traction with Asia’s wealth managers

“I work closely with many of those EAMs and DPM managers, who tell me that discretionary is gradually gaining more traction, and there is growth there, as well. They tell me DPM penetration will take more time and more education of the client base to roll out in Asia, but they say once the private clients better understand DPM, they are much more open to allocating some of their AUM to those mandates.”

“Our streamlined platform enables asset managers to realize their product ideas in a quick and efficient way, allowing for smaller deal sizes and quick time-to-market. A standard product like a simple index tracker can go from product idea to listed security in less than two weeks.” These products can be set up and managed online by the asset manager, turning their investment ideas into fully tradable securities.

However, the product offering extends beyond that. “We perceive ourselves not solely as an infrastructure provider, but also as a solution finder and transaction facilitator. For more intricate transactions, our team of experts will guide you through the complete process, from conceptualizing the product to creating a fully tradable security.” Says Marc. All products can be issued as a bankable security with ISIN code or as an electronic security in token format, allowing for direct transfer from one client’s wallet to another.

Recent Transaction: Conduit Auctus Metal Portfolio Note

The recently unveiled Conduit Auctus Metal Portfolio Note stands as a remarkable testament to Chartered Investment’s capabilities.

Auctus Metal Portfolios Pte. Ltd., a highly regarded bullion dealer in Singapore, operates a proprietary model strategically diversifying investments across gold, silver, platinum, palladium, and rhodium. Leveraging their issuance platform, Chartered Investment has transformed this innovative strategy into a note format.

Each note is backed by the physical storage of metals at Le Freeport in Singapore, providing clients with the

flexibility to opt for physical delivery if requested. The key proposition is to replace a static gold position with the dynamic model portfolio, aiming to outperform traditional investments in physical gold.

Conduit Asset Management Pte. Ltd., an asset manager based in Singapore, through their in-house Asia Wealth Fund and a key investor, have taken the lead as the primary investors in the product. They played a pivotal role in defining the product features. Additionally, another arm of the Conduit Group, Conduit Securities Pte. Ltd., facilitates note trades through their brokerage service and extends distribution within their extensive client base who are “institutional investor” and “accredited investor” as per definition of the Securities and Futures Act (Cap. 289).ⁱ

The Conduit Auctus Metal Portfolio Note underscores Chartered Investment’s commitment to pushing boundaries in financial engineering and providing

cutting-edge solutions to its global clientele. As Marc puts it, “Bringing all these parties together, crafting the legal framework for a transaction of this kind, and hosting the technical infrastructure for it are at the heart of our solutions business.”

Future Plans for Singapore and Beyond

Looking ahead, Marc Rey envisions scaling up operations and expanding into various regions across Asia. Chartered Investment’s focus will be on realizing its vision in Singapore and the broader region. With essential infrastructure in place, Marc anticipates a dynamic period of growth for Chartered Investment.

As Marc Rey continues to lead the charge for international coverage, Chartered Investment remains at the forefront of financial innovation, offering a unique blend of experience, technology, and personalized solutions to its global clientele. ■

Getting Personal with Marc Rey

Marc had not visited Singapore before taking over his role at Chartered Investment. Four years in, Marc has developed a deep appreciation for life in Singapore. He particularly enjoys the city-state’s multiculturalism, diverse culinary scene and the myriad cultural influences on Singaporean cuisine. At the end of a long week, he looks forward to a delicious Indian thali meal in Little India, Peranakan food at Candlenut, or Mala in Chinatown.

Some of Singapore’s standout features, in Marc’s opinion, are its safety, efficiency and connectivity. Since his arrival in Singapore in 2019, he has extensively traveled across the region, with some memorable highlights including a hiking tour in Taiwan, a kitesurfing adventure in Western Australia, and seeing elephants in the wild in Sri Lanka.

Beyond professional and travel experiences, Marc has also found love in Singapore and will soon marry a Singaporean. Anticipating the celebrations in 2024, he looks forward to embracing the cultural richness and joyous festivities of this significant milestone in his life.

For more information about Chartered Investment, visit

Local SG Website: sg.chartered-investment.partners

Our Main company site: www.chartered-investment.com

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