



Why Pay More?

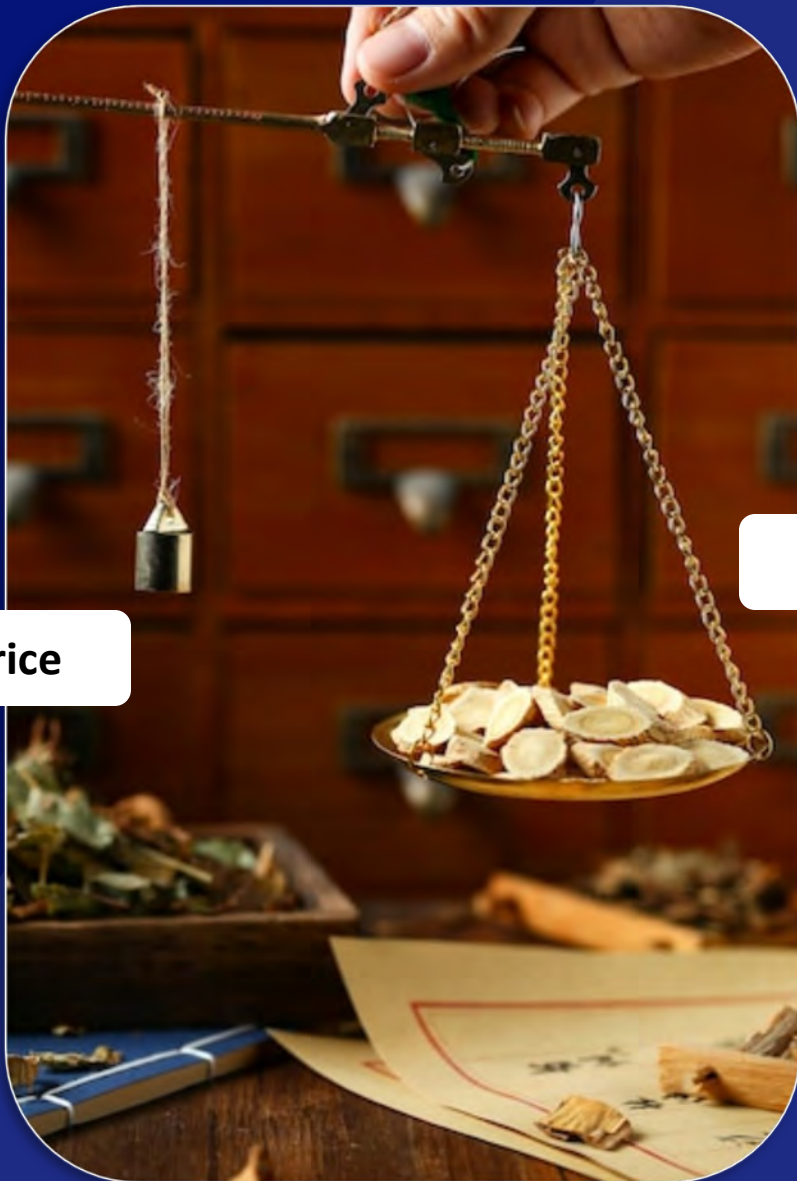
And other important criteria
when selecting your bank or
broker

Ivan Chang

Regional Manager, Institutional Business

Saxo

SAXO
BE INVESTED



Price

Value

WE OFFER 3 KINDS OF SERVICES

GOOD · CHEAP · FAST

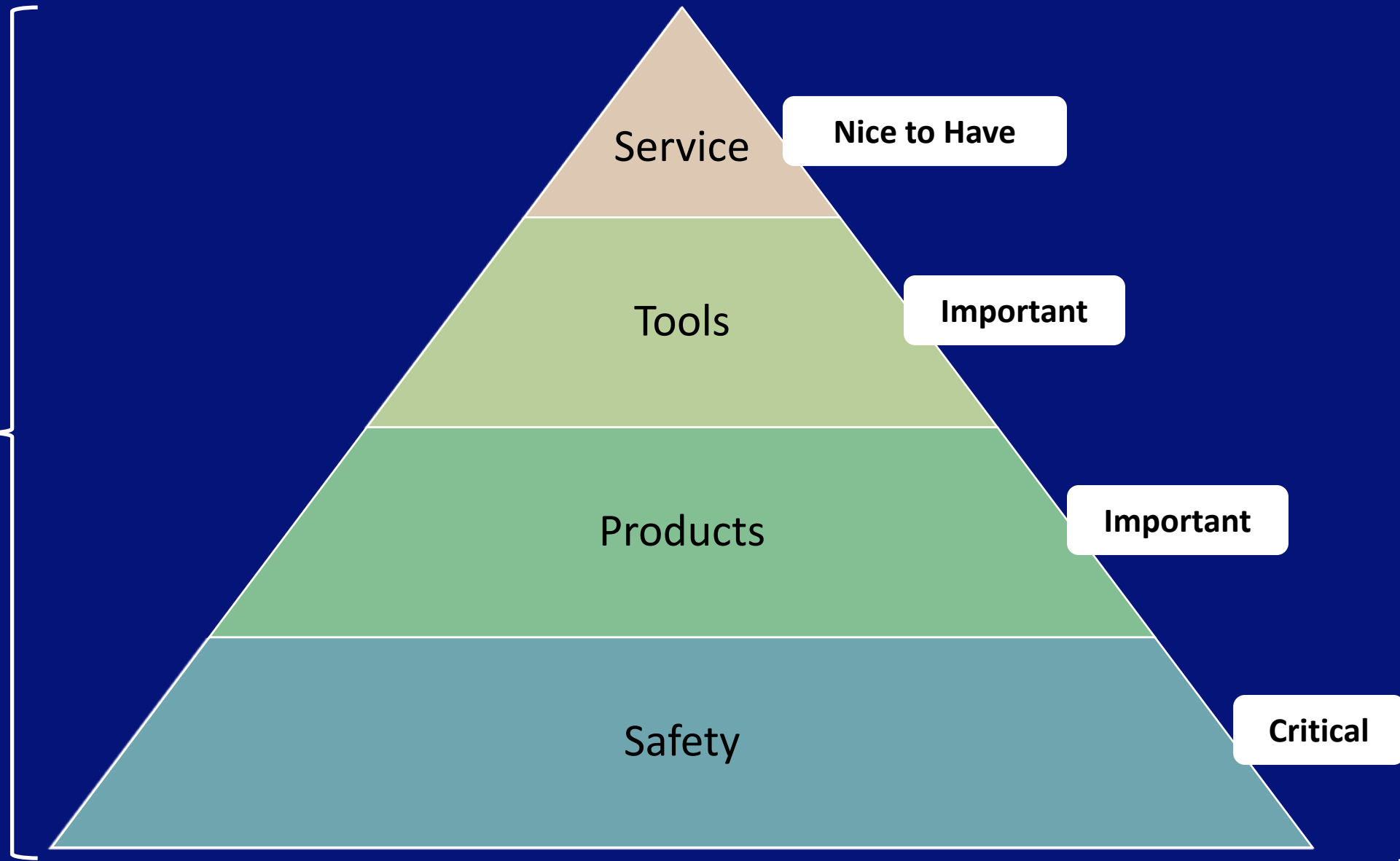
BUT YOU CAN PICK ONLY TWO

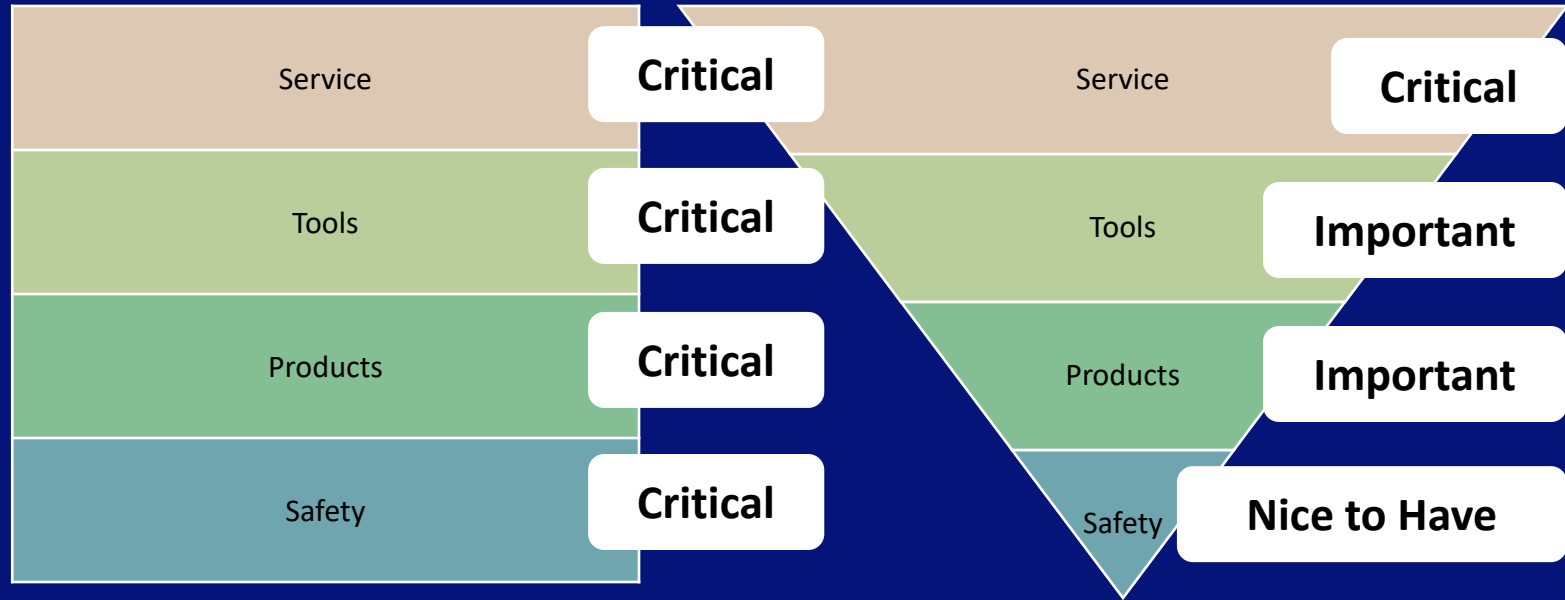
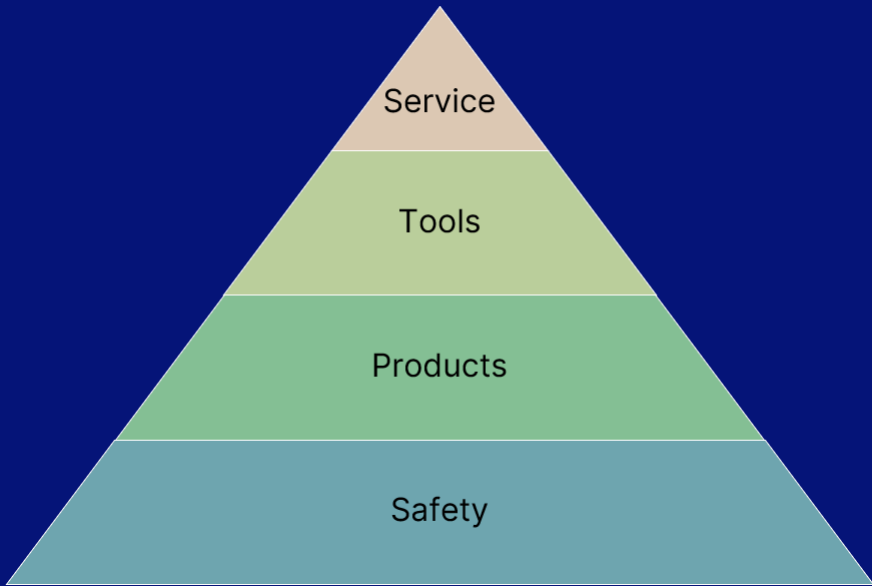
GOOD & CHEAP WON'T BE FAST

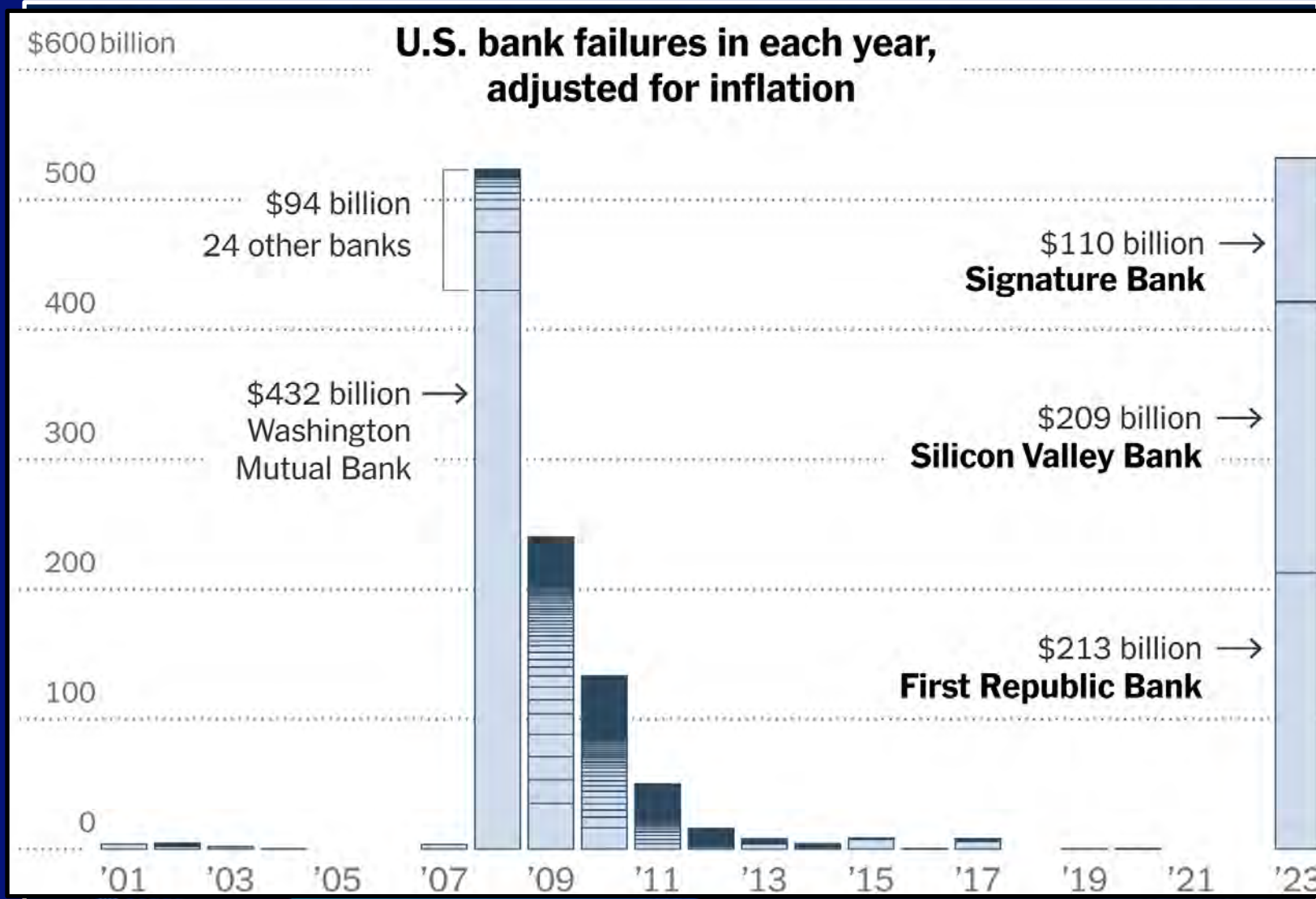
FAST & GOOD WON'T BE CHEAP

CHEAP & FAST WON'T BE GOOD

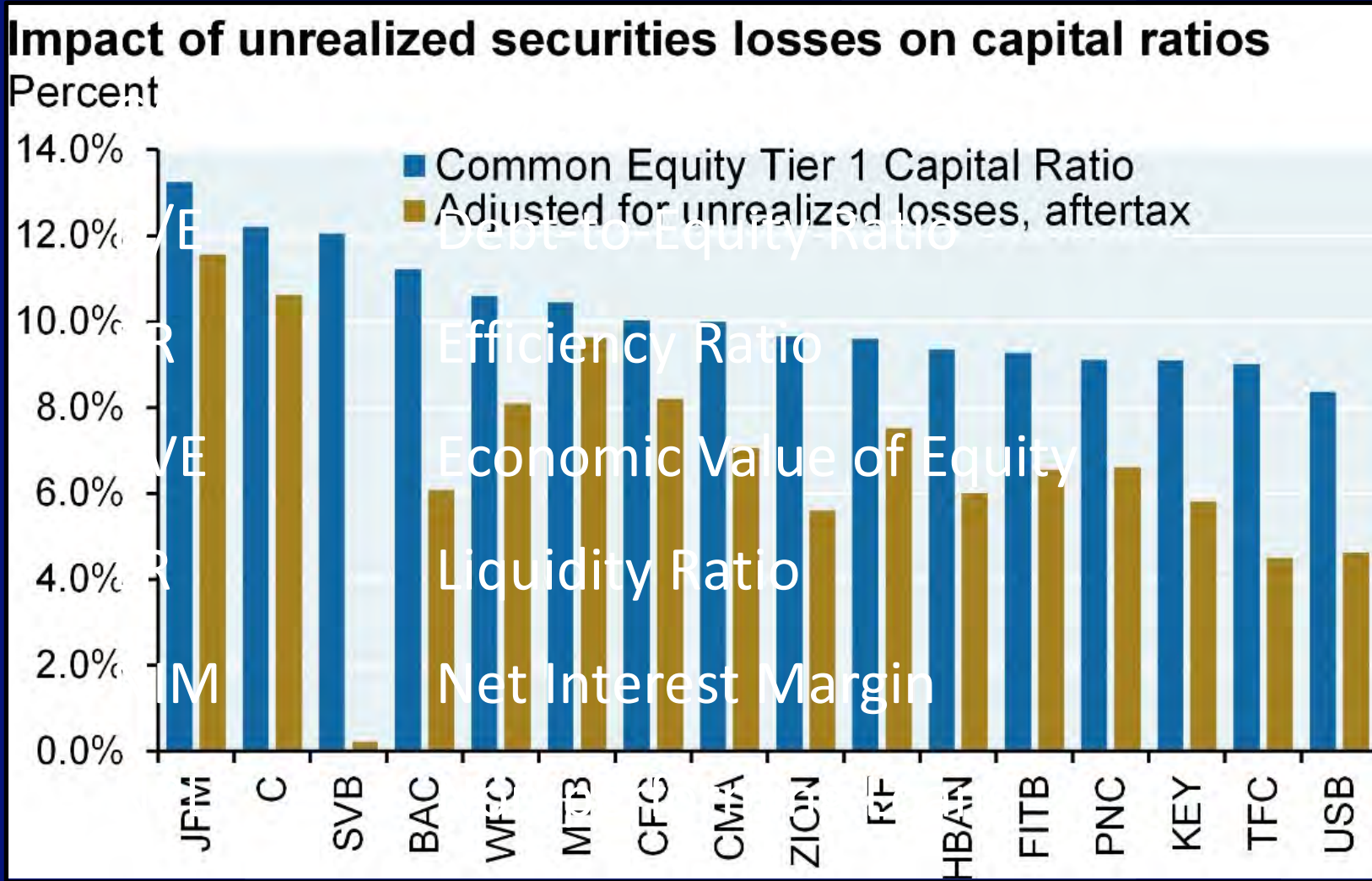
Trust







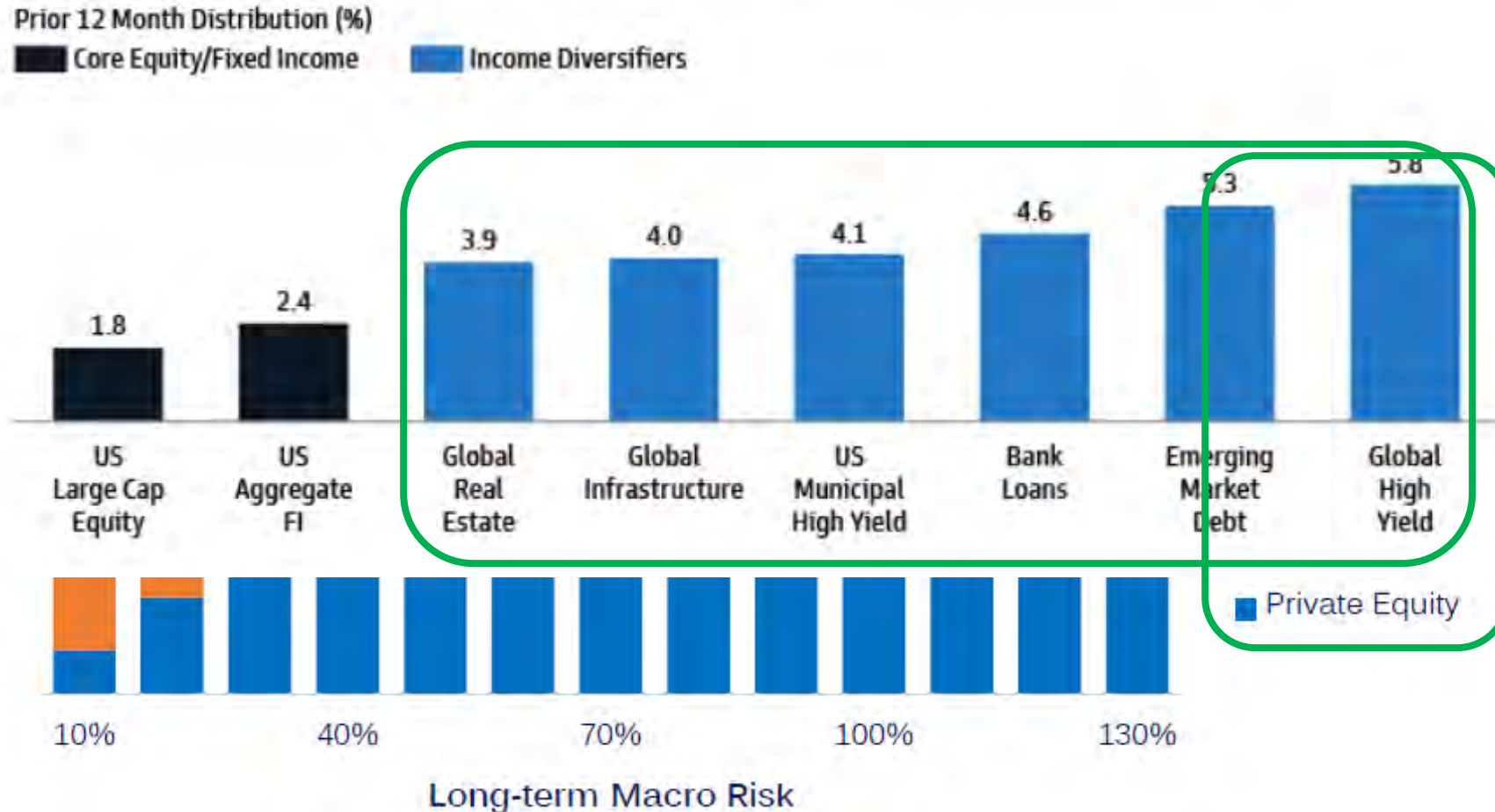
Sources: VisualCapitalist.com; The New York Times



Sources: JPM Asset Management

Exhibit 15: Asset allocations along the macro-resilient efficient

Exhibit 2: Asset Classes That Have Offered Higher Distributions Than the “60/40”



EQ Equities

ETF Exchange Traded Funds

BO Government Bonds
Mortgage bonds
Corporate Bonds

MF Mutual Funds

SF Margin Lending
Securities Lending

CFD Single stocks
Index trackers
Expiring CFDs

LO Listed options

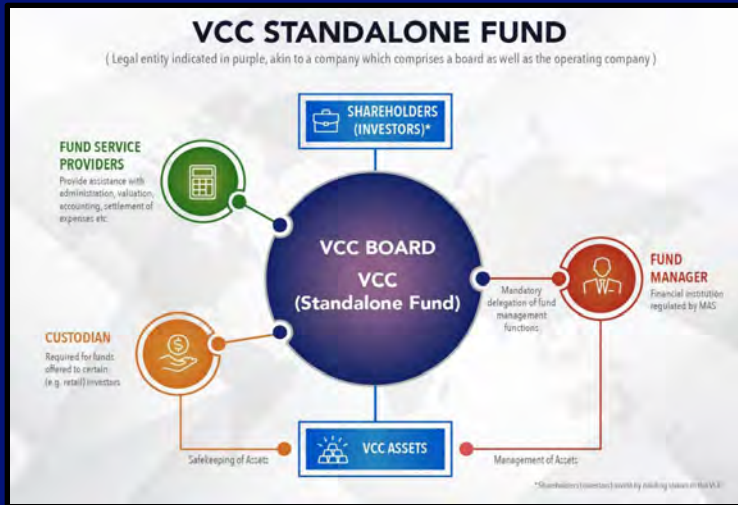
FU Futures

SP Turbos
Warrants, Certificates
Structured Products

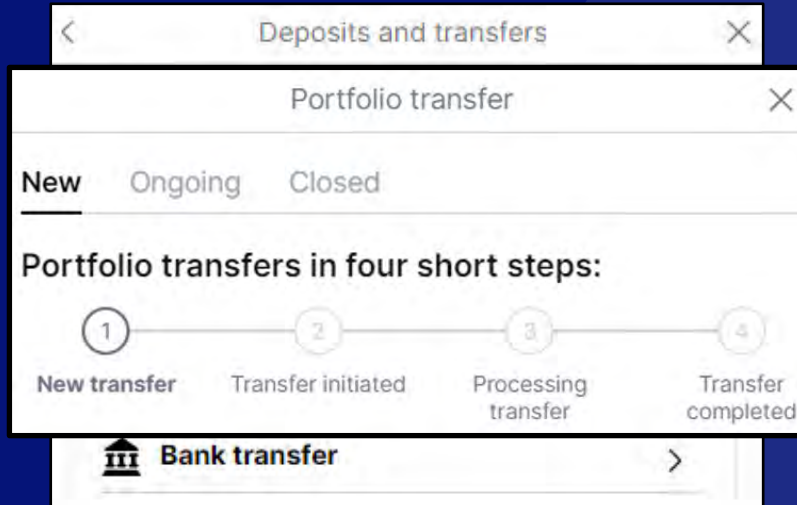
FX FX Spot
FX Forwards, Swaps
NDFs

FXO FX Options Vanilla
FX Option Exotic

CFX CryptoFX



Individuals, trusts, VCCs



Transferring cash & securities

12536391 (12536391)

- 10078902 (IAM Test IB POA Advisory)
- 12728569 (IAM Test Discretionary)
 - 16647123 (Insurer A)
 - 17132783 (Insurer A)
- 16438841 (IAM Test Model Managed – Pension)
- 16439240 (16439240)

Monitoring & advising

Global Balanced Portfolio 2

Instrument	Morningstar rating	Sustainability rating	Model allocation
GLOBAL X MORNINGSTAR GLOBAL TECHNOLOGY ETF	★★★★★	🌍🌍🌍🌍	15.00%
PIMCO GLB INV GRADE CREDIT I (EUR HDG)	★★★★☆	🌍🌍🌍	20.00%
JPM ASIA GROWTH C (EUR)	★★★★☆	🌍🌍🌍🌍	15.00%
FIDELITY EMERGING MARKETS A D	★★★★☆	🌍🌍🌍	14.00%
iShares U.S. Fixed Income Balanced Rsk Factor ETF	★★★★☆	🌍🌍🌍🌍	20.00%
iShares Core MSCI World UCITS ETF	★★★★☆	🌍🌍🌍	15.00%
Cash			1.00%

Portfolio management & trading

Account value

Summary, SGD

Account value 31-Dec-2020: 636,545.65
 P/L: 177,527.62
 Change in accruals: 84.18
 Other bookings: -24.85
 Cash balance currency movements: 915.24
 Total P/L: 178,502.19
 Cash and security transfers: 304,570.63
 Account value 31-Dec-2021: 1,119,618.47
 Change in account value: 483,072.82

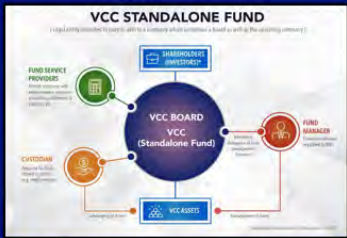
Instrument P/L Returns Cash

P/L, SGD: 177,527.62

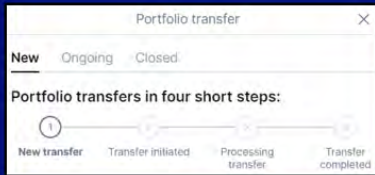
Instrument	P/L, SGD
Advanced Micro Devices Inc.	51,110.62
Nvidia Corp.	41,935.53
Alphabet Inc. - A Share	23,256.96
NORTHPOLE	-11,716.70
US Dollar/Singapore Dollar	-9,875.25
KraneShares CSI China Internet ETF	-9,585.21

Cumulative P/L, SGD

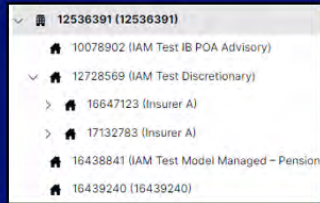
Reconciliation & reporting



Individuals, trusts, VCCs



Transferring cash & securities

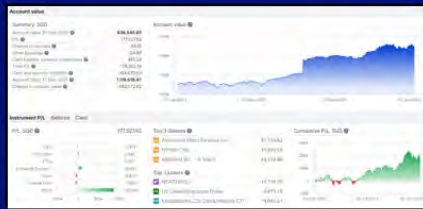


Monitoring & advising

 Eugene Wong (EWO) Senior Sales, Saxo Institutio... Singapore	 Lirong Hu (LIRH) Relationship Manager, Saxo ... Singapore	 Ryan Verma (RYAV) Relationship Manager, Saxo ... Singapore	 Shiqi Han (SHIH) Sales, Saxo Institutional Singapore
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Investment	Morningstar rating	Sustainability rating	Model allocation
GLOBAL X MORNINGSTAR GLOBAL TECHNOLOGY ETF	★★★★★	★★★★	15.00%
PIMCO GLB INV GRADE CREDIT (EUR HDG)	★★★☆☆	★★★★	20.00%
IPM ASIA GROWTH C (EUR)	★★★★☆	★★★★	15.00%
FIDELITY EMERGING MARKETS A D	★★★☆☆	★★★★	14.00%
iShares U.S. Fixed Income Balanced Risk Factor ETF	★★★★☆	★★★★	20.00%
iShares Core MSCI World UCITS ETF	★★★★☆	★★★★	15.00%
Cash			1.00%

Portfolio management & trading



Reconciliation & reporting

 Gregory David (GRED) Account Manager, Saxo Insti... Singapore	 Ryan Koh (RYAK) Account Manager, Saxo Insti... Singapore	 Steve Ji (SEJ) Account Manager, Saxo Insti... Shanghai
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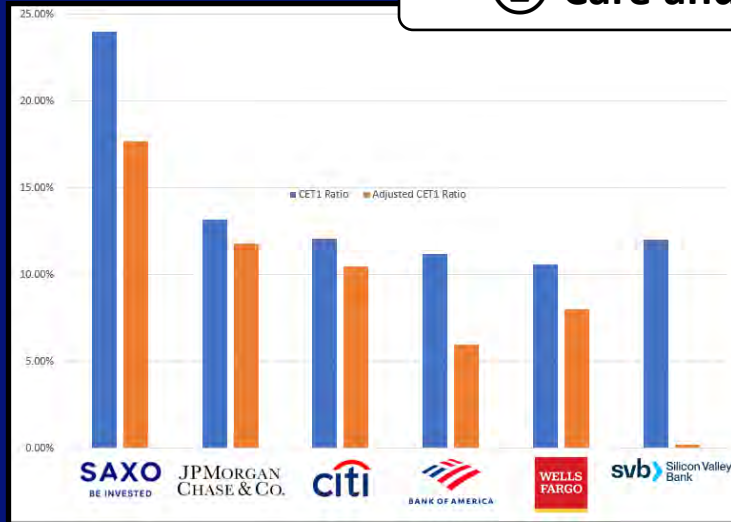
GOOD & CHEAP WON'T BE FAST

FAST & GOOD WON'T BE CHEAP


CHEAP & FAST WON'T BE GOOD




① Care and Duty First




③ Investing in You




Eugene Wong (EWO)
Senior Sales, Saxo Institutio...
Singapore




Lirong Hu (LIRH)
Relationship Manager, Saxo ...
Singapore




Ryan Verma (RYAV)
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Shiqi Han (SHIH)
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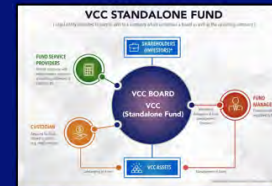
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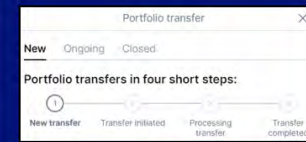
Steve Ji (SEJ)
Account Manager, Saxo Insti...
Shanghai

② Technology – Products and Tools

- EO** Equities
- LO** Listed options
- FX** FX Spot, FX Forwards, Swaps, NDFs
- ETF** Exchange Traded Funds
- FU** Futures
- FXO** FX Options Vanilla, FX Option Exotic
- BO** Government Bonds, Mortgage bonds, Corporate Bonds
- SP** Turbos, Warrants, Certificates, Structured Products
- CFX** CryptoFX
- MF** Mutual Funds
- SF** Margin Lending, Securities Lending
- CFD** Single stocks, Index trackers, Expiring CFDs



Individuals, trusts, VCCs



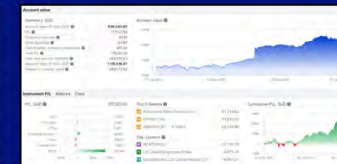
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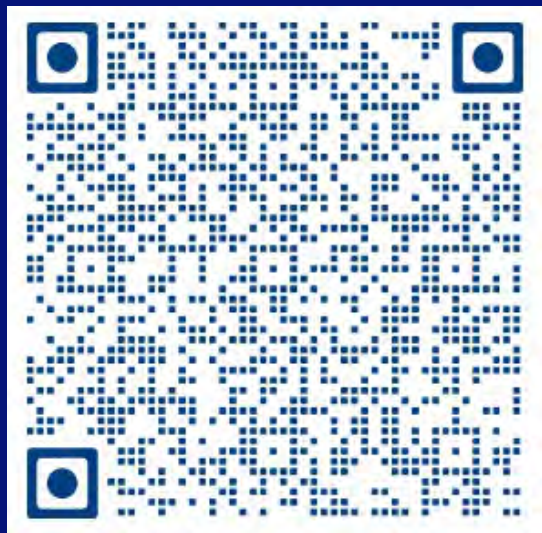
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Instrument	Monitor (rating)	Sustainability rating	Model allocation
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JPM MGA GROWTH C (EUR)	★★★★★	★★★★★	15.00%
FIDELITY EMERGING MARKETS A D	★★★★☆	★★★★★	14.00%
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iShares Core MSCI World UCITS ETF	★★★★★	★★★★★	15.00%
Cash			1.00%

Portfolio management & trading



Reconciliation & reporting

Let's meet



EAM Services





Thank You

SAXO
BE INVESTED

References

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