

7 April 2020

**HSBC OFFERS MULTIFACETED INVESTMENT ANALYSIS TO
JADE CLIENTS WITH ENHANCED WEALTH PORTFOLIO
INTELLIGENCE SERVICE***New Jade Centres in town to serve growing demand
for wealth management*

HSBC launches its enhanced “Wealth Portfolio Intelligence Service” (WPIS) to help its Jade clients gain more in-depth understanding of their portfolios by employing similar tools that institutional investors use to analyse risk exposure, across a much wider range of assets – including unit trusts, bonds, equities, currencies, cash and time deposits. The essence of WPIS is to steer clients through a highly volatile investment environment and accommodate their increasingly complex investment needs.

Powered by Aladdin Wealth technology, WPIS was launched last year, but only covered unit trusts. With the enhanced version, HSBC Jade Directors can now generate risk analysis reports across all the major elements of a multi-asset wealth portfolio and discuss the insights drawn from WPIS’s unique scenario analysis and stress testing with their clients. This creates new opportunities to build resilient investment portfolios in alignment with clients’ personal risk and investment preferences.

Since last year, over 20,000 reports have been generated to provide profound risk insights and analysis for HSBC Jade clients on their unit trust exposure.

Greg Hingston, Regional Head of Wealth and Personal Banking, Asia-Pacific, and Head of Wealth and Personal Banking, Hong Kong, HSBC, said: “In a highly volatile investment market, knowledge is power. By expanding the analysis to cover most of the key liquid asset classes in our customers’ wealth portfolios, we are enabling greater understanding and control of their risk exposure. This will give them peace of mind that they have chosen the appropriate strategy based on their risk appetite and investment preferences.”

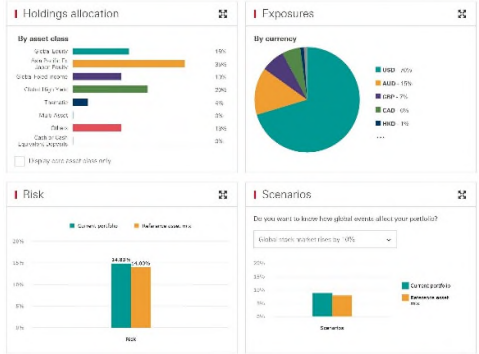
To accommodate increasing demand from affluent customers for wealth management services, HSBC has recently opened two new Jade Centres in Festival Walk at Kowloon Tong and Ocean Centre at Tsim Sha Tsui. To make it even easier for clients to reap the benefits of WPIS, they can also choose to connect remotely and securely through video conference service to discuss their portfolios and investment plans with Jade Directors.

WPIS will empower HSBC Jade Directors to address customers' increasing concerns about their risk exposure. According to HSBC's latest survey¹, 75 per cent of customers with liquid assets of HKD 1 million or above are pessimistic about the Hong Kong stock market in 2020, which may indicate a change in their risk appetite.

Brian Hui, Head of Customer Propositions and Marketing, Wealth and Personal Banking, Hong Kong, HSBC, said: "At times of market uncertainty, we are committed to providing our Jade clients with this top-notch service, a combination of technology and professional expertise, to help manage their investment portfolios. Clients can now get access to the same sort of analytics that institutional investors use to structure their portfolio. The service will help them make better-informed investment decisions, which play an important role in fulfilling their financial ambitions, including building their wealth, preparing for retirement, and planning a prosperous future for their family."

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Note to editors:

Photo	Caption
 (The screen display is for reference and illustration only)	HSBC launches its enhanced "Wealth Portfolio Intelligence Service" to help its Jade clients gain more in-depth understanding of their portfolios by employing the same tool that institutional investors use to analyse risk exposure, across a much wider range of assets – including unit trusts, bonds, equities, currencies, cash and time deposits.
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¹ HSBC commissioned IPSOS to conduct a survey in October last year on consumer sentiment and market outlook for 2020, covering a sample size of 1,002 respondents in mass (with liquid assets below HK\$200K), emerging affluent (with liquid assets HK\$200K to <HK\$1M) and mass affluent customers (with liquid assets HK\$1M or above).

The Hongkong and Shanghai Banking Corporation Limited

The Hongkong and Shanghai Banking Corporation Limited is the founding member of the HSBC Group. HSBC serves customers worldwide from offices in 64 countries and territories in our geographical regions: Europe, Asia, North America, Latin America, and Middle East and North Africa. With assets of US\$2,715bn at 31 December 2019, HSBC is one of the world's largest banking and financial services organisations.

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