



Harness
the power of
everywhere

Discretionary Investment Services



Global Private Banking

Discover the right connection to expand your investment opportunities

Realising your investment ambitions requires you to discover opportunities, no matter which corner of the world they're in. Discretionary investment services from HSBC Global Private Banking helps meet your objectives by harnessing the power of a globally connected team that combines deep local insight with extensive capabilities.

Global
advantage

Focused
vision

For your
future

Take control of a global

force

Discretionary investment services helps you realise your goals. By creating diversified portfolios, your investments can harness opportunities everywhere, at a local or international level. Our globally connected experts help you create and manage a diversified portfolio based on your needs and investment objectives.

Change is inevitable, and staying confined to one security or sector exposes portfolios to higher levels of risk, making investments more vulnerable. Diversification helps portfolios perform better by blending the strengths of different securities in changing market conditions.

Being truly diversified goes beyond access to different markets. Through a global lens, your investments benefit from worldwide diverse expertise and local insight, providing opportunities wherever they arise across sectors and economic cycles.

Global
advantage

A photograph of a wood-paneled wall, likely inside a boat or a cabin. The wall is made of vertical wooden slats. A small, white, teardrop-shaped light fixture is mounted on the wall. The lighting is warm and directional, creating shadows. The text 'Explore global opportunities' is overlaid on the left side of the image in a white, sans-serif font.

Explore global opportunities

Discretionary investment services gives you confidence in knowing your portfolio is being managed on a day-to-day basis by dedicated experts with unparalleled expertise in line with your financial ambitions.

- 500+ HSBC investment professionals connected across 30+ countries
- Ability to create and manage a globally diversified portfolio
- Executed by HSBC Asset Management's in-house institutional expertise. Plus, access to independent third-party experts

A white hexagonal shape with a black outline, containing the text 'Global advantage' in a black, sans-serif font.

Global
advantage

A high-angle, wide shot of a mountainous landscape. The foreground shows a winding asphalt road that curves through a valley with reddish-brown soil. In the background, rugged mountain peaks are visible under a sky with scattered white clouds. The overall tone is warm and natural.

You set the course
We take you there

When it comes to navigating your investment journey, well-informed decisions make all the difference. A focused vision from a team of experts is vital. Discretionary investment services delegates investing decisions to our institutional asset management team.

By clearly understanding your investment goals, your risk level and the type of portfolio you want to build, our global team of experts will identify and harness opportunities that match your predefined requirements and objectives. We provide you with the ability to set certain investment parameters, based on your needs and preferences.

It is important to note that the capital value of, and income from, any investment may go down as well as up, and you may not get back the original amount invested. All products available are subject to eligibility criteria.

Focused
vision



Your vision
Our philosophy

At HSBC, our long-term investment philosophy guides every review and action. Our unwavering commitment to this philosophy is founded on four core principles.

- Global opportunities
The ability to access opportunities, no matter the location or sector. Being a partner who understands cultural nuances and economic cycles to help build diversified portfolios.
- Access the experts
Through open architecture, we have access to leading experts from Global Private Banking, HSBC Asset Management as well as third-party industry expertise.
- Taking a rigorous approach
We work closely with you to understand your vision so we can outline clear principles and strategies that meet your financial ambitions. With regular updates on trends and performance, we keep your investments moving forward.
- Resilient controls
Through our institutional risk management systems, we complete regular rebalancing, systematic risk assessments and put controls in place to ensure you're on the right road.





Harness the power of everywhere

Discretionary Investment Services

To find out more, contact your HSBC Relationship
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Global Private Banking

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For SAA/TAA

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Risks of investing in private markets

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- ◆ **Event Risk** - A significant event may cause a substantial decline in the market value of all securities.
- ◆ **Long-term Horizon** - Investors should expect to be locked-in for the full term of the investment, which is subject to extensions.
- ◆ **No Capital Protection** - Investors may lose the entirety of invested capital.
- ◆ **Unpredictable Cashflows** - Capital may be called and distributed at short notice.
- ◆ **Economic Conditions** - Ability to realise/divest from existing investments depends on market conditions and the regulatory environment.
- ◆ **Risk of Forfeiture** - Failure to make call payments could result in forfeiture of commitment, including invested capital, without compensation.
- ◆ **Default Risk** - in the event of default investors risk losing their entire remaining interest in the vehicle and may be subject to legal proceedings to recover unfunded commitments.
- ◆ **Reliance on Third-party Management Teams** - Underlying investments will be managed by various third-party management teams that will in aggregate determine the eventual returns for the investor.

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