



Your Partner · Your Future

順安概覽

About CIS Group

順安集團成立於2007年，植根香港，放眼環球金融。集團管理層於基金、證券、保險等金融領域擁超過30年經驗，一直秉持集團核心價值—「勇氣、創新、開放」，積極開拓多元的資產配置服務，為香港及亞太地區的中高端客戶及機構客戶提供專業、可靠及全面的一站式金融管理服務。

我們積極構建多元的一站式金融服務平台，竭誠為客戶提供廣泛而全面的增值產品和服務，短短十多年間，建立了六大業務群：

- (1) 證券與資產管理；
- (2) 股本債權資本市場；
- (3) 保險與財富管理；
- (4) 資本與股權投資；
- (5) 財務借貸服務；
- (6) 專業移民服務

集團成立迄今，致力建立既全面且合法合規的金融服務架構。集團成員擁有以下金融牌照及資格：

- ◆ 香港證監會的第1類(證券交易)、第2類(期貨合約交易)、第4類(就證券提供意見)及第9類(資產管理)牌照【中央編號：API164】；
- ◆ 香港聯合交易所有限公司參與者；
- ◆ 保險業監管局的保險經紀牌照【牌照號碼: FB1770】；
- ◆ 強制性公積金計劃管理局的主事中介人【註冊編號: IC001086】；
- ◆ 放債人牌照【牌照號碼: 0463/2021】



Established in 2007, CIS Group is firmly rooted in Hong Kong and specialized in global finance. Our management has over 30 years of experience in the fields of funds, securities and insurance. The Group has embraced its core values - "Courageous", "Innovative" and "Open" to actively develop diversified asset allocation services and provide professional, reliable and comprehensive one-stop wealth management services for mid- to high-end clients and institutional clients in Hong Kong and the Asia-Pacific region.

We strive to provide a one-stop tradition and online investment platform to our clients and partners. We have established six core businesses within 10 years' time. The scope of business includes:

- (1) Securities & Asset Management;
- (2) Equity & Debt Capital Market;
- (3) Insurance & Wealth Management;
- (4) Capital & Equity Investment;
- (5) Money Lending;
- (6) Immigration Service

We established a well-structured business model that comply with all the relevant and applicable laws, regulations and licenses in Hong Kong. Our members have obtained below licenses and qualifications,

- ◆ Licenses issued by Securities and Futures Commission of Hong Kong for Dealing in securities (Type 1), futures contracts (Type 2), advising on securities (Type 4), and asset management (Type 9) [CE No. API164];
- ◆ Participant of The Stock Exchange of Hong Kong;
- ◆ Insurance Broker License issued by Insurance Authority [Membership No: FB 1770];
- ◆ Registered MPF Intermediary [MPF Registration No.: 1086];
- ◆ Money Lenders License [License No.: 0463/2021]

集團架構 Company Structure

集團旗下五間主要成員公司：

Our five major subsidiaries include :

順安證券資產管理有限公司

CIS Securities Asset Management Limited

順安財富管理有限公司

CIS Wealth Management Limited

順安基金開放式基金型公司

CIS FUND OFC

順安國際服務有限公司

CIS International Services Limited

順安貸款有限公司

CIS Finance Limited



順安證券資產管理有限公司

CIS Securities Asset Management Limited

順安證券資產管理有限公司(「順安證券」)成立逾十年，主要提供證券、期貨及期權等交易服務。順安證券擁有香港證監會發出的第1、2、4及9類受規管活動牌照，為認可之持牌法團(中央編號：API164)，可進行證券交易、期貨合約交易、提供資產管理及就證券提供意見。同時，亦為香港聯合交易所有限公司參與者。順安證券為客戶提供便捷而優質的服務，透過網上平台及手機應用程式，為中高端客戶及機構客戶提供一站式可靠的證券、股票及基金投資服務，協助客戶爭取最大資產回報。

CIS Securities Asset Management Limited ("CIS Securities") has been specializing in trading services for securities, futures and options for over a decade. The company is licensed by the Securities and Futures Commission of Hong Kong for types 1 (dealing in securities), 2 (dealing in futures contracts), 4 (advising on securities regulated activities) and 9 (asset management) regulated activities (CE No. API164) and registered in The Stock Exchange of Hong Kong as an Exchange Participant. CIS Securities is committed to offering mid-to high-end and institutional clients reliable one-stop securities, stock and fund investment services through its efficient online platform and mobile application that help maximize the return on investment.



順安財富管理有限公司

CIS Wealth Management Limited

順安財富管理有限公司(「順安財富」)為保險監管局的持牌保險中介人【牌照號碼：FB1770】，亦持有強積金中介人牌照【註冊編號：IC001086】，主要提供理財保險方案、基金產品及強積金產品等。順安財富與香港各大保險公司、基金公司及強積金服務供應商維持長期緊密合作，因應客戶不同階段的財富增值目標，提供貼心、合適及全面的理財策劃、投資產品及保險方案，給予客戶全方位的支援。

CIS Wealth Management Limited (“CIS Wealth”) is a licensed insurance broker under Insurance Authority [Membership No: FB 1770] and a registered MPF intermediary [MPF Registration No.: 1086]. CIS Wealth is well known for its expertise in providing a comprehensive range of protection and wealth management solutions, fund products and MPF products. CIS Wealth has developed an all-round service platform with major insurance companies, fund houses and MPF service providers that support them to provide full-fledged wealth management and protection services that aligned with the clients’ financial goals in different life stages.

順安基金開放式基金型公司

CIS FUND OFC

順安基金開放式基金型公司(「順安基金」)為在香港註冊成立的投資基金。公司由資深的金融專家管理，專注於投資固定收益及中、長線資本增長的各類資產。公司希望憑藉團隊多年的豐富經驗及投資觸覺，為目標高端客戶群提供最佳的投資機會。

CIS FUND OFC (“CIS Fund”) is an investment fund in corporate form domiciled in Hong Kong. Led by an experienced team of financial specialists, CIS Fund engaged in investing in various fixed income and middle and long-term capital growth assets. It aims to identify the best opportunities for high-end clients leveraging its solid experience and astute insights.

順安國際服務有限公司

CIS International Services Limited

順安國際服務有限公司專注於移民諮詢服務，尤其相關投資、金融、財務與稅務等範疇的專業服務。建基於集團的一站式金融服務平台，搜羅與設計多個優質投資移民項目，滿足客戶各項移民需求，如簡便、快捷、低門檻的移民選擇、資產私隱保障、稅務規劃及財務安排。

CIS International Services Limited is a well-developed firm that has solid experiences in immigration consultation services. The professional team is specialized in providing consultation services and arrangement on different countries and areas. It also committed to provide a holistic range and suitable solutions to its clients, enable them to get the legal immigration status easily. The one-stop immigration consultation services include assessment on application eligibility, to process the application, investment arrangement and face-to-face consultation.

順安貸款有限公司

CIS Finance Limited

順安貸款有限公司(「順安貸款」)，是香港持牌放債人【牌照號碼：0463/2021】，成立逾十年，主要為有短期資金需要的客戶提供靈活便利的融資方案，經營的業務包括：香港房地產抵押貸款、香港上市公司股票抵押貸款、信用貸款、銀團貸款及貸款安排諮詢服務等。

CIS Finance Limited (“CIS Finance”) is a licensed money lender in Hong Kong [License No.: 0463/2021]. It strives to provide flexible and convenient money lending solutions for client who have short- term financing needs. The services include: mortgage loans of Hong Kong, share financing of Hong Kong shares, credit loans, syndication loan and loan consultancy.

我們的核心價值

About CIS Group

順安集團一直倡導三大核心價值—「勇氣、創新、開放」。

Guided by our values of being “Courageous, Innovative, Open”, the Group stands out with its ability to...

開放 (Open)

以開放的態度去聆聽客戶及持份者所需，並且坦誠進行溝通；

Listen to the needs of clients and stakeholders with an open mind

創新 (Innovative)

以創新思維去尋求解決方案及服務；

Develop solutions and services with an innovative spirit

勇氣 (Courageous)

敢於面對改變及挑戰、竭誠為客戶提供優質及具價值的服務，成為業界翹楚；

Embrace changes and challenges to offer premium value-added services



重要里程碑

Group Milestones



業務範疇

Our Business Scope

順安集團建立了完善且多元的一站式金融服務平台，為客戶提供廣泛而全面的資產增值產品和服務，並建立了六大業務群：

CIS Group strives to provide a one-stop tradition and online investment platform to our clients and partners. We have established six core businesses which includes:



證券與資產管理

Securities & Asset Management

- 證券
- 基金
- 債券
- 期貨與期權
- 資產管理
- Securities
- Funds
- Bonds
- Futures and Options
- Asset Management



股本債權資本市場

Equity & Debt Capital Market

- 上市公司新股配售
- 上市公司債券配售
- IPO承銷
- Initial Public Offering (IPO)
- Bond Placement
- IPO Underwriting Placement



資本與股權投資

Capital & Equity Investment

- 獨角獸權益投資
- 私募股權投資
- Unicorn Private Equity
- Private Investment in Public Equity



保險與財富管理

Insurance & Wealth Management

- 香港、澳門、新加坡各大保險公司的人壽險、重疾、醫療、儲蓄及投資相連保險
- 香港年金、自願醫保
- 大額保單、香港保費融資
- 香港各大強積金計劃
- 香港各類財產保險
- Whole life insurance plan, critical illness plan, medical plan, savings plan and investment linked assurance scheme with different insurance companies in both Hong Kong, Macau and Singapore respectively
- Hong Kong annuity plan, voluntary health insurance scheme
- Premium financing of insurance plan
- Hong Kong Mandatory Provident Fund (MPF) Scheme
- General insurance protection



財務借貸服務

Money Lending

- 香港房地產抵押貸款
- 香港上市公司股票抵押貸款
- 信用貸款
- 銀團貸款
- 貸款安排諮詢服務
- Mortgage Loans of Hong Kong Property
- Share Financing of Hong Kong Shares
- Credit Loan
- Syndicated Loan
- Loan Consultancy



專業移民服務

Immigration Service

- CRS諮詢
- 土耳其投資移民計劃
- 台灣投資移民計劃
- 香港投資移民後續服務
- 香港優才、專才計劃
- 海外房地產
- CRS Advisory Services
- Turkey Investment Migration Program
- Taiwan Investment Migration Program
- Hong Kong CIES Services
- Hong Kong Quality Migrant Admission Scheme
- Overseas Property

全方位金融科技平台

Our All-in-One Fintech Platforms

順安集團時刻與時並進，積極開拓多元化的交易平台，並不斷提升平台技術，務求讓客戶不論何時何地，都可透過線上、線下的平台或手機應用程式進行各類型的投資，當中包括股票、基金、債券、期貨及期權等，捉緊市場每個投資機遇。

Staying ahead of the game means that we have to keep abreast of times. With our powerful trading platform and the most advanced technologies, clients will be able to seize every opportunity anytime, anywhere through the online and offline trading platforms. Clients can enjoy the utmost convenience brought by our online trading platform and mobile application that cover stocks, funds, bonds, futures and options.



網上交易平台
Online Trading Platform

隨時隨地透過電腦或行動裝置登入CIS的交易平台進行各類交易或查看產品資訊

Enable clients to place orders, make trade and get product information without territorial or time limitations



手機應用程式
Mobile Application

在順安專屬的手機應用程式，除可進行股票、債券、期貨及期權等買賣外，亦可透過最新的「投資+ Investplus」平台，買賣超過1,000隻基金和債券及獲取基金分析、基金簡要等資訊

Other than stocks, bonds, futures and options, clients can also trade over 1,000 funds, get the latest fund analysis and summary digitally through the brand new "Investplus" platform



線上開戶
Open an CIS Account Online

隨時隨地也可進行線上開戶，簡單完成4個步驟，即可成功開戶，進行投資

With just four steps, clients can open their CIS account and make trade immediately



雲計算平台
Cloud Computing Platform

業務夥伴可透過雲計算平台輕鬆管理客戶資訊，同時獲取各類投資產品的最新資訊

B2B clients can manage customers account, as well as grasp the latest products and services information

集團活動 Group Event

順安集團與業務夥伴建立了良好夥伴關係，多年來除積極開拓業務發展機遇外，每年亦會邀請業界代表舉辦專題投資分享會，與客戶及同業洞識市場動向及趨勢，捕捉市場機遇。

CIS Group has developed a good relationship with its business partners, from the past to the present, we have always explored potential business opportunities, and also organized annual investment seminar with the representatives of finance industry to share the market trends and insights with clients.



2017

CIS 談Fund論價·投資講座暨交流會

CIS "Tan Fund Lun Jia" Annual Investment Forum 2017

2018

CIS 投資 2019 | AI·FinTech
投資講座暨交流會

CIS "AI · FinTech" Annual Investment Forum 2018

2019

CIS新總部開幕禮暨業務發展策略

CIS Grand Opening Ceremony 2019

2020

金融同業·上市企業 Happy Hour 分享會

Happy Hour and Networking Event with Finance Business Partners & Listed Co.



