

Discretionary Management Account Services (DMA)

Selected Authorized Fund DMA

To cope with client's needs on the CIES requirement, leveraging on the experiences on the examination on investment performance and philosophy of fund houses and fund managers over the years, investment manager is able to integrate the market trend from those authorized publicly offered funds of SFC, and arrange a suitable fund portfolio for clients, seizing for a stable and reasonable returns for clients.

Flexible Authorized Fund DMA

Through the long-term observation and study on over 1,000 authorized publicly offered funds of SFC, investment manager actively keeps exploring the superior fund houses and fund managers, building an ideal fund portfolio which match with the market opportunities that leading clients to enjoy professional management, diversify their investment and achieve ideal return.

Global Equity DMA

In order to generate an aggressive and a robust investment strategy for clients, investment manager proactively seizing the opportunities of global equity market, selecting a concise list of most capable and potential stocks, and proceed appropriate risk management and investment diversification.

Custom-made DMA

With the experience in selecting investment manager and offering asset allocation and wealth management for clients over a decade, CIS has the ability to pick the most suitable investment manager for clients, offering them a tailor-made DMA services that fit with their needs.

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