

# Building investments

*with professional investors*



**Tricio**  YOUR  
 INVESTMENT  
 BUDDY

# An independent investment buddy for you and your clients

Having the **right people** within your investment team is the **core** of a successful investment process. Connecting with the right people will also help you and your clients manage new challenges.

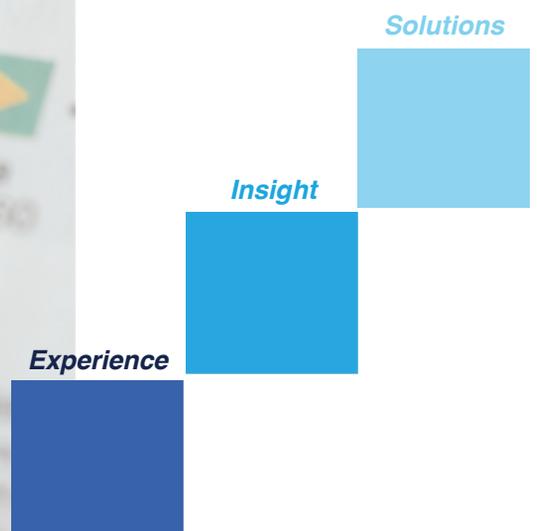
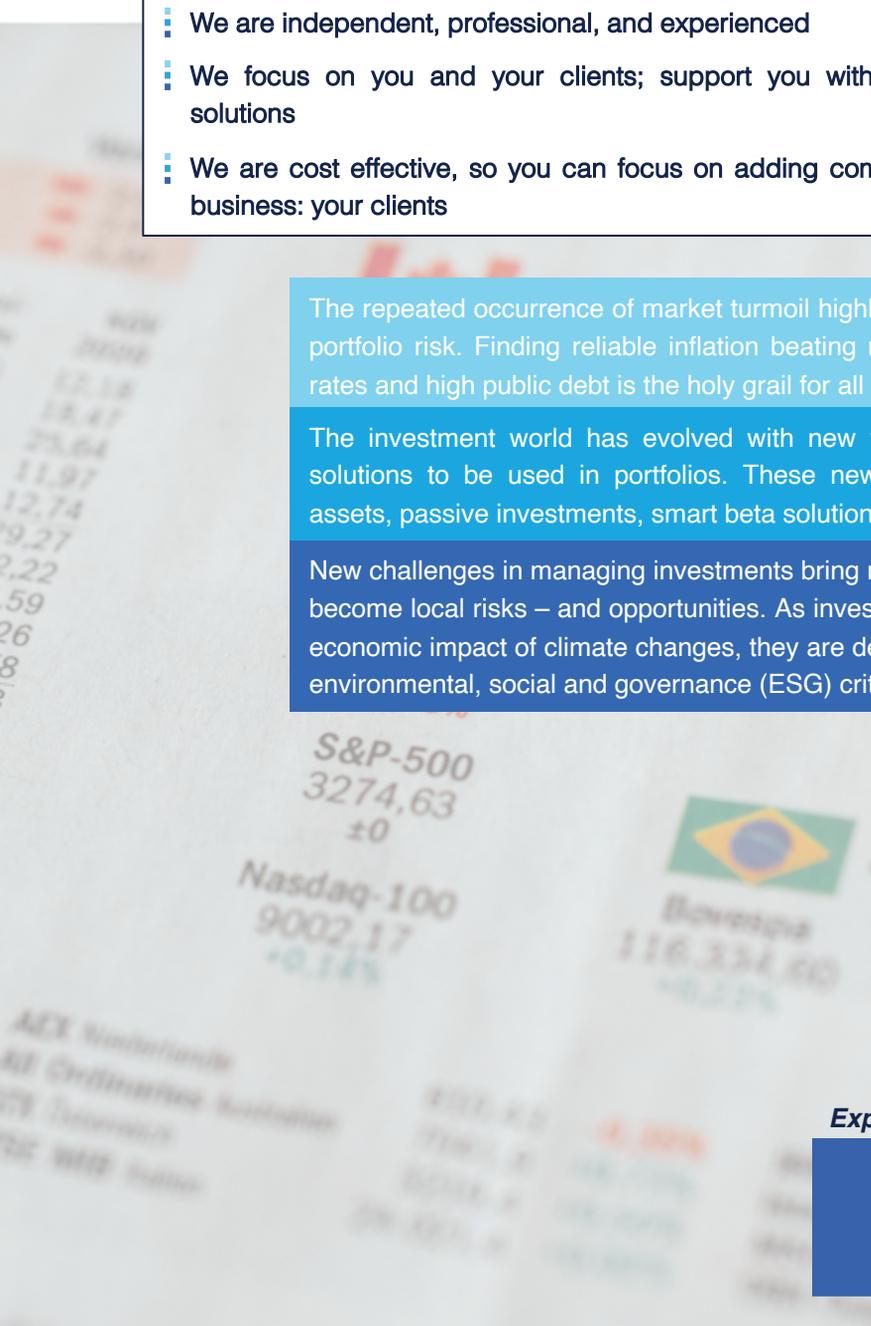
**Tricio's mission** is to be your **investment buddy** and support you and your clients on all aspects of the investment process.

- We are independent, professional, and experienced
- We focus on you and your clients; support you with quality insights and actionable solutions
- We are cost effective, so you can focus on adding compelling value to the core of your business: your clients

The repeated occurrence of market turmoil highlights the importance of actively managing portfolio risk. Finding reliable inflation beating returns in an environment of low interest rates and high public debt is the holy grail for all investors.

The investment world has evolved with new types of investments that allow creative solutions to be used in portfolios. These new investment options include: alternative assets, passive investments, smart beta solutions, structured products, to name a few.

New challenges in managing investments bring new risks and also rewards. Global events become local risks – and opportunities. As investors become more aware of the long-term economic impact of climate changes, they are demanding alignment of their portfolios with environmental, social and governance (ESG) criteria.



## The Tricio team

We started working as a team at American Express Bank (AEB) and Standard Chartered. Collectively, we supported our colleagues and clients to build investments. We put together investment research and strategy papers for individual and institutional clients and provided practical guidance to help clients make and implement investment decisions. Our experience included advising on portfolio strategies, investment funds, structured products and alternative investments.

**Our approach** has always been to stay close to our clients. We actively listen to them and address questions on:

- Economics
- Financial markets
- Asset allocation
- Financial products

**Our focus** has always been on actionable solutions, helping clients achieve their investment goals, managing risks and opportunities effectively. Successful investment strategies can only be achieved by taking controlled risks over clients' investment horizons.

**Our combination** of skillsets and tailored approach will also benefit wealth managers and professional advisors and their clients, inside and outside UK.

**Launched over US\$2 bln of investment products**

**Advised over US\$4 bln of client assets**

**Experience in equities, bonds, currencies, structured products, alternative investments**

**Frequent conference speakers and media commentators (BBC, CNBC, Bloomberg)**

Tricio provides a truly integrated, independent view of markets together with actionable solutions. As your helpful investment buddy, we aim to provide the very best information and perspective possible to help you build investments for your clients.



John Calverley  
Chief Economist  
(AEB, Standard Chartered)



Gerry Celaya  
Chief Strategist  
(BofA, AEB, Redtower)



Dr. James Chu CFA  
Head of Investment Solutions  
(HSBC, AEB, Standard Chartered)

### Our philosophy

- *Disciplined process*
- *Actionable solutions*
- *Open and independent*
- *Quality insights*
- *International approach*
- *All about you and your client*

# How can we help you?

## Tricio Insights

Our independent economic and global investment insights are specially crafted for investment managers, advisors and professional investors.

### Economics for Investment

Quarterly analysis of the global and key country economic cycles. Tricio's proprietary 'SOLVER' model provides recommended asset allocation with an emphasis in controlling market risk.

### Monthly Insights

Our monthly insights cover global multi-asset strategies, current themes such as investing for income and ESG. A product insight section provides 'Under the Bonnet' view on how certain investment products do and don't work.

### Weekly Talking Points

This weekly bulletin gives our customers investment ideas and topical views to help address the questions that your clients will be asking you.

***Free trial available  
Please contact us for details***

## Tricio CIO

Based on the best practices and experiences we have with clients, we developed the Tricio CIO service to give you the best support in building investments for your clients. In addition to receiving Tricio Insights, this personalised service lets us stay close to you and your clients.

We will have regular in-depth meetings where we address your investment needs and concerns, tailored to meet your specific requirements.

Our 'Ask a Buddy' service gives you access to us at any time, where we, your 'investment buddy', provide answers to your queries directly.

You can choose any combination of the following add-on investment support modules, tailored to help you build investments.



**Bespoke  
asset  
allocation**



**Investment  
selection and  
analysis**



**Bespoke  
independent  
investment  
advice**



**Investment  
product and  
solutions  
development**

***Talk to us to see how we can  
help you build investments***

## Additional services

We offer other tailor-made services to help you and your clients. Examples include: training, bespoke or white-labelled research, client events, product governance support. Call us to discuss how we can help you.

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