

Advisory Mandate



Your time is precious. We aim at helping you achieve your financial objectives. The Advisory Mandate is ideally suited if you wish to take your investment decisions while benefitting from an expert advice.

Regardless the time you have available or how closely involved you would like to be, we propose different approaches to fulfill your goals.

Investment Philosophy

Your financial objectives will determine the solutions and services offered to you in order to achieve these objectives. Together we will discuss and define your investment profile, your risk tolerance, your knowledge and experience in investing, and your investment horizon.

Your mandate may cover the asset categories cash and cash-like instruments, fixed income, equities, and alternative investments.

Hoving Partners constructed an extensive network of specialists and partners, modelling our broad know-how in major trends, hence assuring continuous increased added value in advising you.

Our investment team helps you build your investment portfolio across asset classes and markets worldwide. We provide you with investment ideas and in-depth market analysis. This approach allows you to be closely involved in building the investment strategy you require.

Communication is key. You will receive regularly a reporting regarding your investments. And we keep track of all changes that may impact or change your investment objectives.

Tailored services

Classic approach: You want to make your own investment decisions. Hoving Partners gives you full access to investment ideas and various market analyzes.

Dynamic approach: You wish a proactive investment advice, from a dedicated investment expert, to benefit from different market opportunities.



Tailored solutions

Besides the traditional offering on different asset classes, Hoving Partners will give you access to:

- An innovative thematic approach based on disruptive technologies and structural changes. You will benefit from in-house solutions as well as a wide variety selected among our partners
- Alternative strategies, uncorrelated with traditional markets, managed by active and talented managers to bring diversification to your portfolios as well as added-value
- Tailor-made, individual (structured) products fitting your risk/return profile
- Active advice to enhance your portfolio return like foreign exchange advice and hedging



Your services

- Advice on portfolio structure and investment instruments.
- Classic and bespoke investment strategies.
- Continuous monitoring investment portfolio and investment strategies
- Proactive notification of market opportunities.
- Recurring monitoring of the risk profile, suitability and appropriateness
- Regular portfolio analysis by your relationship manager and/or an investment consultant
- Direct/indirect access to investment consultant (frequency according to client's needs)



Investment Process

Investment strategy

Based on our top-down analysis main economic trends and variables as well as new economic, political, social developments



Asset allocation

Dynamic allocation between asset classes, aiming to outperform markets during all phases of economic cycle



Portfolio Implementation

Selection and appraisal of investment instruments. Investment style; active vs. passive; hedging; credit strategy; ongoing review



Risk Management

Our risk control processes are clearly defined and applied throughout all of the investment process.

Characteristics

Minimum amount Euro 5'000'000

Investment Horizon

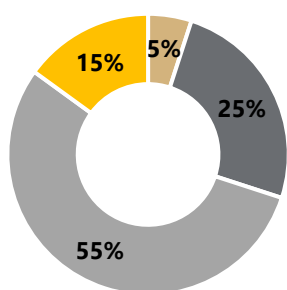
- Conservative mandate 3-5 years
- Balanced mandate 5-10 years
- Dynamic mandate > 10 years

Liquidity of investments * daily

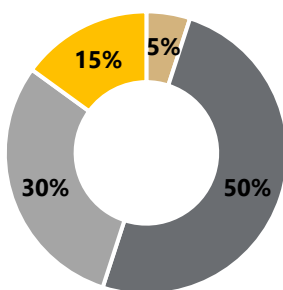
Reference currencies EUR, CHF, USD

** Not including alternative investments*

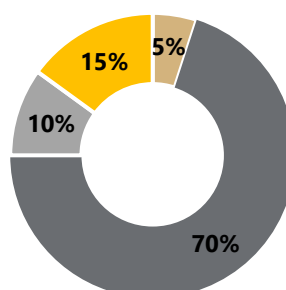
Conservative



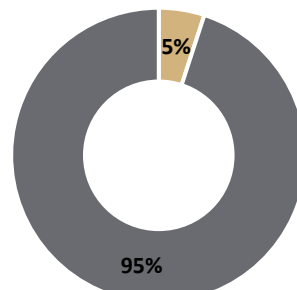
Balanced



Dynamic



Equity



Cash and money market
 Bonds (bandwidth: +/- 20%)

Equities (bandwidth: +/- 20%, except for "equity")
 Alternative investments (bandwidth: +/- 10%)



CONTACT

Contact your relationship manager or our discretionary mandate service directly

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