

HSBC Prism Advisory

Focused service for independent investors





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With HSBC Prism Advisory offering, you get access to our whole range of products and investment solutions while keeping the full control over your investment decisions. We provide you with our strategic and tactical views and support you in managing your investments upon request.

The Prism Advisory offering has been designed for investors who wish to keep control of their trading activity whilst regularly rebalancing their asset allocation towards their risk/return objectives. Under the Prism Advisory offering, you drive the level of interaction with us, receiving advice upon request.

Your Relationship Manager is your single point of contact to handle your investment related queries and address any financial idea or any concerns you may have.

You can also benefit from our monitoring and supervision of your portfolio and will be notified of relevant securities switches in our recommended product lists.

Your account investment profile as well as the positioning and performance of your portfolio will be reviewed annually to ensure your investment strategy is in line with your needs and risk appetite.





You will have access to all Global Private Banking views and publications on our digital platform to stay informed on market developments and related opportunities.

Finally, our online account reporting will give you the comfort of maintaining an overview of your investments anytime, anywhere.

Your benefits

- Access to dedicated Relationship Manager for all financial queries
- A simple, understandable and efficient approach to investments
- An investment solution that responds to your long-term strategic needs
- The construction of a diversified and well structured portfolio in line with your risk profile
- Full control over investment decisions
- Notification in the event of portfolio or product issues
- Ad-hoc portfolio monitoring upon request
- An annual review of your investment strategy and asset allocation
- Easy and convenient access to financial information and investment publications

Service Components of HSBC Prism Advisory

Access to Expertise		
	Named Relationship Manager	✓
Portfolio Advising		
	Investment advice	Upon request & on an ad-hoc basis
	Comprehensive Portfolio Review discussion	Annually
	Provision of monthly Market Investment Outlook	✓
	Notifications of changes to recommendation status of portfolio positions covered by the Bank's Investment Policy	✓
Portfolio Monitoring & Reporting		
	Annual review of Account Investment Profile	✓
	Pre-trade reviews on advised trades ¹	✓
	Post-trade reviews ²	Upon request & on an ad-hoc basis
	Access to online account reporting	✓
Access to content via Knowledge & Research Centre		
	Global Private Banking publications ³	✓

¹ Asset concentration and portfolio risk

² At portfolio level (on issuer concentration, asset allocation, liquidity, currency risk and portfolio risk) and at position level (on asset concentration).

³ Global Investment Committee Monthly View, Quarterly Investment Outlook, The Big Picture (non-exhaustive list)

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