HSBC Prism Advisory Total

Bespoke service for dynamic investors

HSBC
Private Banking

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With HSBC Prism Advisory Total offering, you will decide on the level of advice that best fits your needs. We will be there to support you with investment ideas and our views of international financial markets.

The Prism Advisory Total offering addresses the needs of our most sophisticated investors. In addition to your Relationship Manager, your Investment Counsellor will handle your investment related queries, follow financial markets and provide you with proactive and adapted investment advice.

You will also have access to a team of Product Specialists who will complement your Investment Counsellor's view with more in-depth analysis on each asset class and market. Upon request, our Investment Strategist will give you a review of global markets and our strategy.

You will receive up to monthly updates on investment themes and asset allocation reviews, and will be notified of relevant securities switches in our recommended product lists.

You will also benefit from our active monitoring and supervision of your portfolio as well as from an up to monthly detailed portfolio and performance review that will allow you to follow your investments and the development of your portfolio. You can also receive advanced quantitative analysis of your portfolio upon request.

You can access to HSBC Global Private Banking publications and HSBC Global Research material in order to keep you up-to-date on market developments.

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 and Investment Counsellor
- Access to Product Specialists and Investment Strategist upon request
- A specifically tailored investment solution that responds to your long-term strategic needs
- A well diversified and optimally structured portfolio involving all asset classes in line with your risk profile
- Full control over investment decisions
- Proactive investment advice
- Access to market opportunities
- Continuous portfolio monitoring
- Up to monthly reviews of your portfolio, investment strategy and asset allocation
- Access to advanced quantitative portfolio and performance analytics
- Access to our strategic, financial and macroeconomic views
- Access to research on all asset classes[1]

[1] Subject to suitability and cross-border assessment

Service Components of HSBC Prism Advisory Total

Access to Expertise	
Named Relationship Manager	✓
Named Investment Counsellor	✓
Access to Product Specialists upon request	✓
Access to Credit Specialist upon request	✓
Access to Investment Strategist upon request	✓
Portfolio Advising	
Proactive Investment advice	At the Bank's initiative & driven by client's needs
Comprehensive Portfolio Review discussion	Up to Monthly
Provision of monthly Market Investment Outlook	✓
Monthly update on Investment Themes	✓
Notifications of changes to recommendation status of portfolio positions covered by the Bank's Investment Policy	✓
Bespoke Asset Allocation guidelines	✓
Portfolio Monitoring and Reporting	
Annual review of Account Investment Profile	✓
Pre-trade reviews on advised trades[1]	✓
Post-trade reviews[2]	✓
Advanced performance analysis[3]	✓
Access to online account reporting	✓
Access to content via Knowledge & Research Centre	
Global Private Banking publications[4]	✓
Macroeconomics and Foreign Exchange research	✓
Single Security Research[5]	✓

[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] Back-testing, performance attribution, correlation, risk analysis: back-testing, risk analysis (stress-testing), portfolio optimisation
[4] Global Investment Committee Monthly View, Quarterly Investment Outlook, The Big Picture (non-exhaustive list)
[5] Subject to suitability and cross-border assessment

IMPORTANT NOTICE

PBRS/06/17/18; 2017.12