



Your trusted partner for Investment & Currency Management Solutions

# MAXIMIZE GROWTH AND PRESERVE CAPITAL

## Asset & Wealth Management

We manage our clients' money as we do our own to maximize growth and preserve capital. We believe a **systematic** process is fundamental in best practice investing.

## Currency Management

We design **customized** solutions based on each client's unique context to maximize interest from cash holdings & protect against currency volatility with our FX Hedging product suite.

 **WealthBriefingAsia EAM**  
**AWARDS 2023**

**WINNER**  
Based in Hong Kong

SystematicEdge Limited

Find out more at: [SystematicEdge.com](https://SystematicEdge.com)

# Systematically Maximizing Growth and Preserving Capital for Families and Corporations



**Rosemary Goater** - Chairwoman  
**Alain Groshens** - CEO  
**SystematicEdge**



***"We are focused on what we do best: Providing Investment and Currency Management Solutions to our clients with the goal of preserving capital, maximizing returns, and minimizing costs."***

#### **Please explain why your firm has been successful?**

SystematicEdge is focused on what we do best: Providing Investment and Currency Management Solutions with the goal of preserving capital, maximizing returns, and minimizing costs. We are a Hong Kong based Asset and Wealth Manager, SFC licensed for asset management and advising on securities. Our clients are professional investors: High Net Worth Individuals, families, family offices, corporations and financial institutions.

For our Investment Management clients, we use our flagship portfolios as building blocks and integrate themes, sectors, and regional allocations based on investors' return objectives, risk profiles, and theme preferences. All of our portfolios are managed using our proprietary systematic process, which is rules based, in order to systematically accumulate asset income and capital gains. We believe a systematic process is fundamental in best practice investing.

For our Currency Management clients, we design customized solutions based on each client's unique context to maximize interest from cash holdings and protect against currency volatility with our FX Hedging product suite.

We believe traditional financial services firms are at an inflection point. In this new asset management paradigm, it is our mission to use technology to deliver high performing, systematic, investment and currency management solutions to our clients.

We design, implement and manage, in house, our own solutions and strategies which allows us to customize them for our clients for a fraction of the cost of a "traditional financial services firm".

#### **What has led to your firm's success and what role did your team play?**

Delivering results to our clients has led to our success. This is possible due to SystematicEdge's portfolio management team's expertise in derivatives and institutional financial instruments across asset classes. We have experience designing solutions for some of the largest and most demanding institutional clients. The sophistication of our portfolio management offering is unique in the market and requires experts to be able to deliver it.

#### **From whom and what do you get inspiration?**

As a client centric organization, inspiration comes from our clients' needs, for whom we work to design optimal solutions.

For example, we have clients with operating businesses in multiple markets wanting to know the best solution to mitigate their currency risk and improve the interest on their multi-currency cash holdings. In these cases, we provide a case study to outline the objectives and costs of different solutions or strategies proposed, so the client can make an informed decision.

As another example, we have private clients who have certain wealth management requirements based on considerations such as future milestone goals, risk tolerance and return objectives. We work with them to customize our investment solutions to meet those needs and objectives.

We also get inspiration from the financial markets and provide our clients with ongoing insights on current market opportunities based on our extensive experience and in house research.