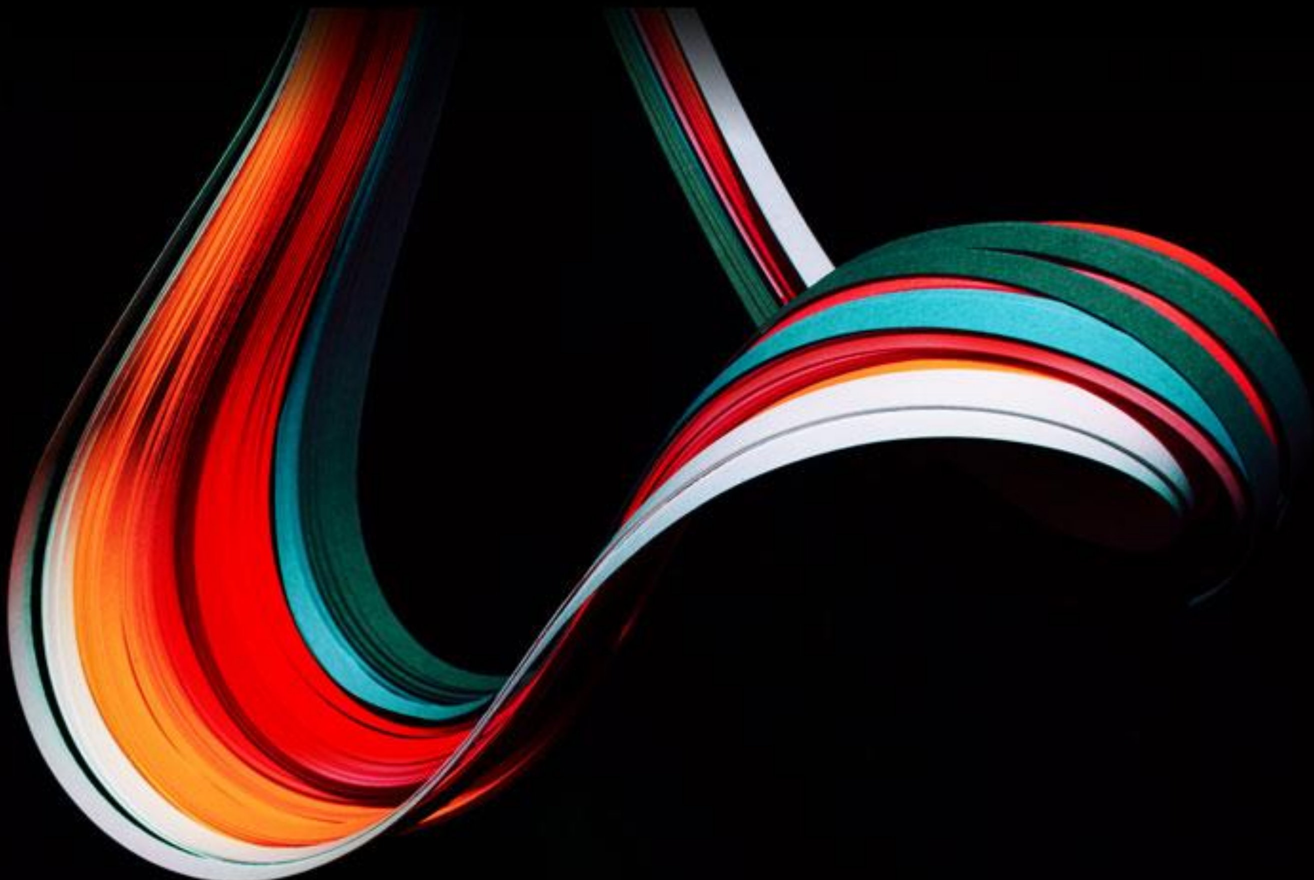
HSBC Global Managed Portfolio Service

Reasons Why



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HSBC Asset Management

Why invest in HSBC Global Managed Portfolio Service?

Six reasons to choose our portfolios for your clients

(1) Truly globally diversified

HSBC Asset Management's portfolios do not have a home bias and therefore provide investors access to growth opportunities across the world, while also maximising diversification.

(2) Active asset allocation

Global investment markets are ever changing; our dynamic approach aims to take advantage of these evolving opportunities to create value for investors.

(3) Strong focus on cost

We focus on delivering the best possible value for money, investing in a range of low cost ETFs and index funds.

(4) More than a service, a partnership.

Few organisations have the global reach of HSBC Asset Management. Insights from dedicated MPS investment specialists are combined with additional expertise from more than 79 multi-asset professionals located in key markets around the world.

(5) Consistent, proven institutional processes.

HSBC Asset Management's processes are driven by their core investment view - that clear investment beliefs and a well-executed process are critical to delivering long-term value. Our global asset management team uses this philosophy along with expertise and tools to allocate and actively rebalance funds – creating portfolios that are consistent with all their institutional multi-asset solutions.

(6) Experience & tools to help manage risk.

Risk comes in many forms and from places you might not expect. As a global asset manager with over 40 years of experience, HSBC Asset Management can spot and deal with potential hazards quickly. That is because their extensive in-house capabilities allow us to model and evaluate risk based on expert analysis using a wide range of data.

Past performance does not predict future returns. The value of investments and any income from them can go down as well as up and investors may not get back the amount originally invested.

Source: HSBC Asset Management as at September 2023

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Key risks

It is important to remember that the value of investments and any income from them can go down as well as up and is not guaranteed.

Counterparty Risk: The possibility that the counterparty to a transaction may be unwilling or unable to meet its obligations.

Credit Risk: A bond or money market security could lose value if the issuer's financial health deteriorates.

Default Risk: The issuers of certain bonds could become unwilling or unable to make payments on their bonds.

Emerging Markets Risk: Emerging markets are less established, and often more volatile, than developed markets and involve higher risks, particularly market, liquidity and currency risks.

Exchange Rate Risk: Changes in currency exchange rates could reduce or increase investment gains or investment losses, in some cases significantly.

Interest Rate Risk: When interest rates rise, bond values generally fall. This risk is generally greater the longer the maturity of a bond investment and the higher its credit quality.

Investment Fund Risk: Investing in other funds involves certain risks an investor would not face if investing in markets directly. Governance of underlying assets can be the responsibility of third-party managers.

Investment Leverage Risk: Investment Leverage occurs when the economic exposure is greater than the amount invested, such as when derivatives are used. A Fund that employs leverage may experience greater gains and/or losses due to the amplification effect from a movement in the price of the reference source.

Liquidity Risk: Liquidity Risk is the risk that a Fund may encounter difficulties meeting its obligations in respect of financial liabilities that are settled by delivering cash or other financial assets, thereby compromising existing or remaining investors.

Operational Risk: Operational risks may subject the Fund to errors affecting transactions, valuation, accounting, and financial reporting, among other things.

Further information on the potential risks can be found in the Key Investor Information Document (KIID) and/or the Prospectus.

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