



Credit Suisse Portfolio Solutions

Personalized strategies to help you grow,
preserve, and use your wealth

“I would like to grow my wealth without spending every minute monitoring the markets.”

“I am looking for innovative solutions to preserve my wealth and stay ahead of inflation.”

“I would like my assets to generate steady income that I can use.”

We all have different needs in life, so why should choosing your investment strategy be any different? Whatever your needs are, Credit Suisse Portfolio Solutions is built around your personal objectives.





A constantly evolving financial landscape requires an approach that lets your investments keep pace with your needs, now and in the future.

With the global financial landscape changing rapidly, it is becoming increasingly difficult for investors to identify opportunities. Drawing on Credit Suisse's over 150-year heritage of serving sophisticated individuals and families across the world, Credit Suisse Portfolio Solutions matches personal needs with a personalized investment strategy and service offering.

The Discretionary Portfolio Solution lets Credit Suisse align your assets according to your financial objectives and agreed strategy, while the Advisory Portfolio Solution lets you take an active role in your investment decisions. Regardless of which approach you choose, you will enjoy global access to market-leading insights from our Investment Strategy/Research teams, and investment specialists to give you the big picture and help you stay ahead.

Credit Suisse Portfolio Solutions – the blueprint for your investment objectives.

Your personalized Portfolio Solution starts with the Credit Suisse Advisory Process. With the support of our investment specialists, your Relationship Manager will identify your investment profile and map out an investment strategy that is aligned to your personal objectives.

Our objective is to implement an effective and personalized Portfolio Solution that works over multiple economic cycles

YOUR INVESTMENT PROFILE

We identify your:

- Needs
- Objectives
- Preferences
- Risk Profile

YOUR INVESTMENT STRATEGY

The investment strategy represents your personal plan to achieve your needs and objectives

YOUR INVESTMENT SERVICES

The development of your investment strategy is monitored and you can be as involved as you wish in the process

Your Portfolio Solution

OUR INVESTMENT EXPERTISE

Credit Suisse offers a transparent and robust investment process that takes into account strategic views and tactical momentum for investment decisions



You decide on your involvement – delegation or participation.

With Credit Suisse Portfolio Solutions you have the flexibility of delegating your portfolio management to us or taking an active role in your day-to-day investment decisions.



SCENARIO 01

YOUR OBJECTIVE:

You want to grow your wealth but are too busy to take care of your investments. In addition, you believe in the growth potential of Asia and would like to focus your investments in this region.

OUR SOLUTION:

Asian Opportunities Exclusive Selection and Fund Selection are two discretionary solutions that we believe will match your requirements. An experienced portfolio manager will take care of your investments and align your portfolio with the latest Credit Suisse investment ideas.

SCENARIO 02

YOUR OBJECTIVE:

You are interested in financial markets and confident about making your own investment decisions. At the same time you would like to focus on investments which generate a regular cash flow which you can use for other purposes.

OUR SOLUTION:

The High Income strategy focuses on investments which generate regular payments like dividends or interest coupons.

MULTI ASSET CLASS DISCRETIONARY PORTFOLIO SOLUTION

- You prefer to delegate all day-to-day investment decisions to Credit Suisse

YOUR BENEFITS

- Experienced professionals manage your investments
- Make the most out of investment opportunities by leveraging from an efficient and timely execution
- Access our latest investment ideas
- No need to constantly monitor markets
- Stay on top of your situation with regular updates and performance reports
- Benefit from a simple and transparent fee structure which demonstrates an alignment of interests

HIGH CONVICTION ADVISORY PORTFOLIO SOLUTION

- You prefer to make your own investment decisions
- You manage your portfolio with our advice

YOUR BENEFITS

- Retain direct control of your portfolio
- Receive professional opinion on your investment ideas
- Access our latest investment ideas
- Enjoy regular updates on your investments
- Benefit from a simple and transparent fee structure which demonstrates an alignment of interests

Make the most out of investment opportunities with our integrated and systematic process.

The changing financial landscape has shown that professional and flexible asset management is indispensable to achieving your investment objectives. Credit Suisse Portfolio Solutions provide a systematic and integrated investment process that draws on the bank's global resources.

Over 235 dedicated investment specialists monitor global financial markets, including 25 locations in Asia, for opportunities around the clock. It is this commitment to helping clients thrive and our proven expertise in Private Banking and Wealth Management that has enabled Credit Suisse to consistently win awards and recognition from numerous financial publications.



Benefit from a transparent and robust Credit Suisse investment process



SCENARIO 03

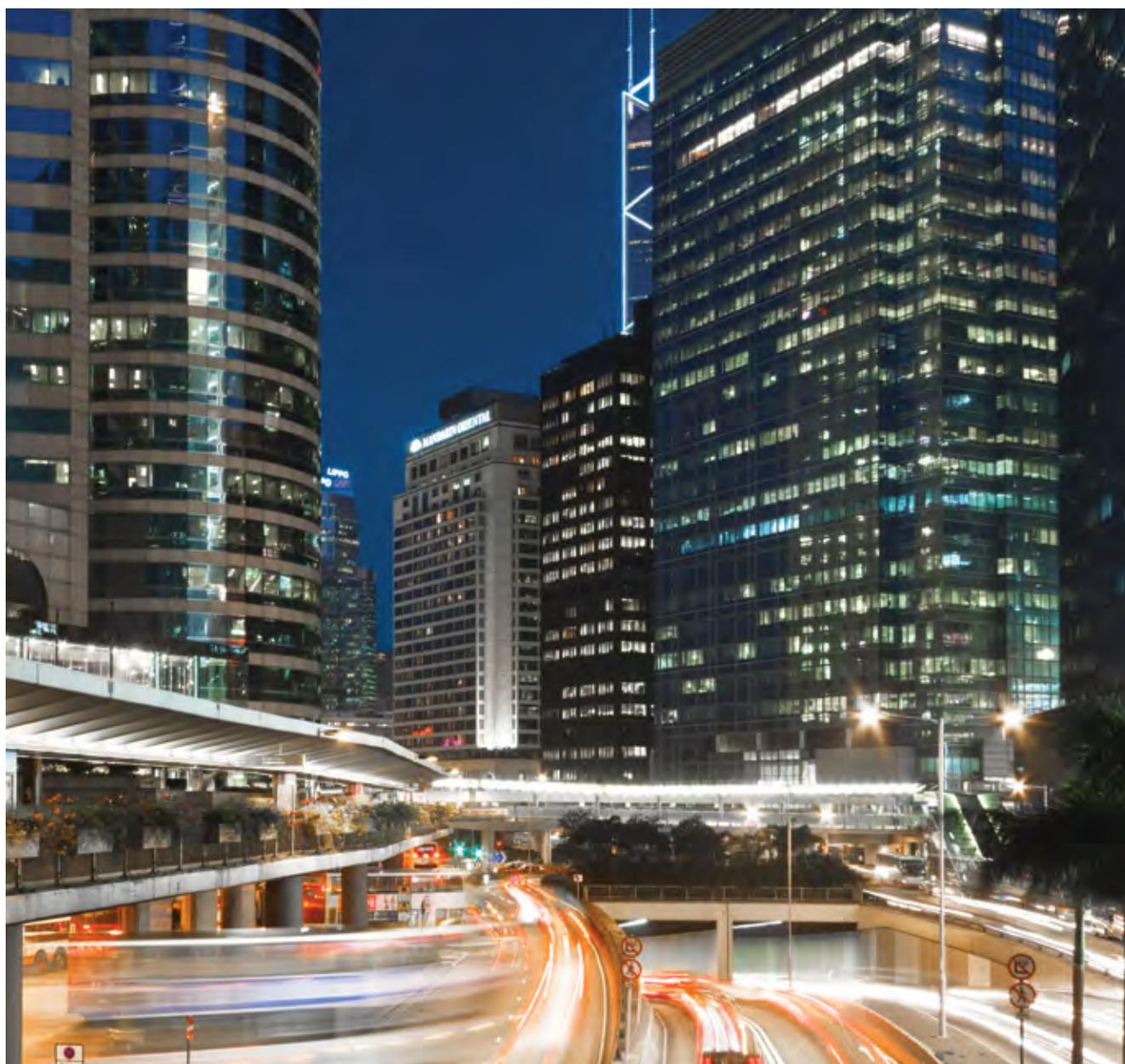
YOUR OBJECTIVE:

You want to grow your wealth by riding on the current global recovery. You seek investment ideas but would like to make your own investment decisions.

OUR SOLUTION:

The Global Strategy allows you to make investment decisions based on proposals from your Relationship Manager and investment specialist. Our investment process ensures that we will provide you with promising investment ideas reflecting your growth expectations.

Empowering you to make the right decisions with a wealth of insights.



As a Credit Suisse Portfolio Solutions client, you will benefit from a wide range of investment services, allowing you to stay abreast of market developments and make informed decisions.

An agile investment approach with personalized services to meet your needs

PORTFOLIO REVIEWS

- Regular reviews to ensure your investments are in line with your objectives and risk profile
- Structured support throughout the investment process

PORTFOLIO REPORTS

- Transparency about your investment holdings with detailed analysis on market, sectors, currencies and more
 - Regular statements for your investments
 - Regular performance reports

INVESTMENT OUTLOOK AND IDEAS

- Updates on the latest economic and market-specific developments which may impact your portfolio
- Access to the latest investment ideas

YOUR INVESTMENT SERVICES

MONITORING

- Timely investment ideas related to your portfolio
- Monitor your risk and return

TAILORED EXTENSION OF SERVICES

- Specialist access (investment consultants, portfolio specialists and portfolio managers)
- Chief Investment Officer views
- Tailored portfolio reports

Now more than ever you need a personalized investment approach that is agile and presents you with myriad opportunities to help you realize your investment objectives.

To find out how Credit Suisse Portfolio Solutions can work for you, please contact your Relationship Manager.



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SNLE1 APAC 07.05.2014