**Wealth Management**

**FUND SELECT: How we select funds**

Screening & Identification
Actively screens across a wide universe of more than 87,000 funds to shortlist a subset of the most suitable funds for each investment idea.

1. **Idea Generation**
   Fund ideas are generated from the team's:
   a) Assessment of current investment trends
   b) Consideration of Standard Chartered Bank’s ‘House views’

2. **Due Diligence**
   a) Portfolio Manager meetings are conducted to assess relevance and merit of fund strategies
   b) Funds are selected using a FST proprietary scoring methodology based on a '3P' framework, evaluating:
      i) People
      ii) Process
      iii) Performance

3. **FST Committee Approval**
   a) Recommendations go through a formal approval process with the aim to have an additional layer of oversight
   b) FST Committee unanimously decides to add/remove a fund recommendation

4. **Communication**
   a) Fund Select views are articulated to various stakeholders through email communications, conference calls and presentations
   b) 'Client approved' collaterals are provided to the frontline to facilitate client discussion

5. **Ongoing Monitoring & Review**
   Fund Select funds are thoroughly reviewed on a regular basis and performance updates are communicated monthly to the frontline.

6. **Contact Us**
   For more information, please contact us.