

Process

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The Fund Select team is responsible for establishing Standard Chartered fund offering. Our team is one of the largest dedicated to fund due diligence in Asia. Our analysts cover a wide range of asset classes, including equities, fixed income and alternatives, across the globe.

We seek to identify fund managers with a proven but more importantly sustainable investment edge that in our opinion should allow them to achieve superior returns over a market cycle. Our approach to fund selection combines both quantitative and qualitative analysis. And through regular meetings with fund managers, we assess their capabilities through what we call the 3 P's: Performance, People, and Process.

The Fund Select team's motto is: "The performance should tell the story of the process". Hence, as part of our qualitative analysis, we also review thoroughly a fund manager's investment process: can the portfolio manager articulate her idea clearly and does she apply it consistently? Also it is very important to understand how investment ideas are generated. We tend to rate firms highly who have very well-resourced research teams which are able to generate ideas in-house, instead of relying on external research. The two other areas of the investment process, portfolio construction and risk management, are closely linked. The portfolio manager's approach in terms of diversification, sector/country exposure and liquidity management, is carefully reviewed as well.