

Tricio investment support module

Investment selection and analysis



Our support includes:

- Ongoing support to your investment analysts
- Analyses of the drivers and consistency of fund manager performance
- Go under the bonnet for more complex investments
- Research and due diligence on alternative investments, structured products and foreign exchange

Case study

A multi-family office was looking at fixed income investments backed by real assets. The firm wanted James Chu CFA, Tricio's Head of Investment Solutions, to review these securities to ensure that the investments were used by the firm's advisers in an appropriate manner.

What did James do?

Let's take a deep dive...

James reviewed these investments in depth. The process included meeting the issuer and arranger of the investments, studying all the legal documents and any independent research conducted on the investments and reviewing the due diligence done by the firm. James then wrote enhanced due diligence reports for the firm, which were used as part of the inputs in making the final investment decisions for its clients.