

Tricio investment support module

Bespoke asset allocation



Our support includes:

- Ongoing technical support to your asset allocation
- Advice on portfolio optimization and construction
- Advice on rebalancing and portfolio risk control
- Advice on review process for MiFID II and PROD rule

Case study

A UK wealth manager approached James Chu CFA, Tricio's Head of Investment Solutions. Their team was running income portfolios for retired private clients on a discretionary basis. But the performance was not good and some clients were unhappy with the variability of the income they received.

What did James do?

The solution

James worked with the client and their team and rebuilt the income portfolios into model portfolios that had different expected return and portfolio volatility targets for their respective clients. He also established a new investment process in managing the model portfolios. The model portfolios were based on an asset allocation that the investment team of the firm maintained regularly. The investment would be spread globally and across multiple assets, including money market and structured notes.