

Tricio investment support module

Bespoke independent investment advice



Our support includes:

- Monthly meetings including more specific input for your investment team/committee
- Independent advisor to sit on your investment committee
- Review and oversight of your investment process including performance analysis

Case study

A UK stockbroker was asked to start running a new fund. With a lack of experience and process, the firm approached James Chu CFA, Tricio's Head of Investment Solutions, for help for ongoing investment support and oversight.

What did James do?

What was done

James set up an investment committee and proposed the operational protocols with senior management. That included the necessary reporting and monitoring. James then worked with the investment team and established the investment process. It was based on a top down approach, covering asset allocation, risk limits, security appraisal and selection, and final portfolio construction.