



**CAMBRIDGE
ASSOCIATES**
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Who We Are

Since our founding in 1973, we have been a market leader in building custom investment portfolios that aim to generate outperformance over the long term. With 14 offices around the globe and a world-class network of investment managers, we offer the scale, resources, and networks of a global firm, coupled with the trust, independence, and personal attention of a boutique firm.

With over 20 years of on-the-ground experience in Asia-Pacific, and offices in Beijing, Hong Kong, Singapore, and Sydney, we bring deep local expertise to our clients. By integrating the insights of our regional teams with the full capabilities of our global platform, we help clients achieve their long-term investment goals and access a diverse range of compelling opportunities across both global and regional markets.

Who We Serve

Whether it's empowering future generations, supporting charitable endeavors, funding employee retirements, or preserving a lasting legacy, we aim to maximize each portfolio's potential and empower our clients to make a meaningful impact on the world.

50+

years of investment
innovation

1000+

clients
globally

US\$660+

billion assets under
advisement or
management ^[1]

Endowments & Foundations

We were originally founded as an investment partner to not-for-profit organizations. Today, we work with over 580 endowment and foundation clients, and we are proud to be associated with these institutions that are making the world a better place.

Private Clients & Family Offices

We have been meeting the unique needs of wealthy individuals, families, and family offices worldwide for over 40 years. As an independent investment firm, we are investors who take on our clients' challenges and goals as our own.

~300

senior investment
professionals ^[2]

Pensions & Other Institutional Investors

We have been working with pensions and retirement plans for over 50 years. Today, we work with approximately 170 corporate, public, and union plans, as well as sovereign wealth funds, and insurance companies worldwide.

Healthcare Systems

We also have more than 35 years of experience working with healthcare-related institutions to build and manage sophisticated investment programs that meet their unique needs and help them support their communities.

18

average years
of industry
experience of
senior investment
professionals ^[2]

96%

average annual
client retention
rate ^[3]

Note: Data as of December 31, 2025. Cambridge Associates is a global group of companies that provide investment management, investment advisory, research, and performance reporting services. For the purposes of this document, "us", "the Firm", "our", "we", "CA", "Cambridge Associates", and similar terms refer collectively to this group, and unless otherwise stated the figures provided herein are combined totals for these companies.

[1] "Assets under advisement" include the portfolio values of the firm's and its affiliates' clients that receive investment advice or management and performance reporting. In a limited number of instances, client portfolio values include assets for which Cambridge Associates is only responsible for reporting performance and does not have an investment advisory responsibility. For portfolio values without final data available for December 31, 2025, assets from the prior quarter or estimates have been used.

[2] Senior investment professionals are those with a business title of Director or above. Industry experience may include investment-related work or support roles within financial services or investment offices. It may also include experience gained from temporary work such as internships.

[3] Not indicative of client satisfaction. Average annual rate for five years ending December 31, 2025.

Why Cambridge Associates



Partnership

Our high-touch investment approach ensures that each client's portfolio risk level aligns with their long-term objectives.



Expertise

Our investment team has deep experience in each client segment and specialists in private investments, sustainable and impact investing, and diverse manager investing to help deliver the specific outcomes our clients seek.



Access

Our deep relationships in the investment industry help our sophisticated client base access sought-after funds and provide fund managers with a strong and consistent source of capital.



Alignment

With no other business agendas competing for our best ideas, our investment decisions are motivated solely by our clients' interests.

Our Investment Approach

We work in close partnership with each client, providing guidance across multiple dimensions, including:

- Conducting a review to understand a client's requirements, investment goals, and financial ecosystem
- ▼ Creating an investment policy to outline risk constraints, return expectations, and investment objectives
- ▼ Setting strategic asset allocation and investment manager structure
- ▼ Performing rigorous due diligence to identify and select investment managers for a client's portfolio(s)
- ▼ Managing the portfolio on a day-to-day basis while delivering operational support to execute investment decisions
- Advising on environmental, social, and governance (ESG) investments, when of interest

Portfolio Management Services

1

Discretionary / Outsourced CIO

For clients who wish to delegate portfolio management decision making, we serve as their fully resourced investment office, accountable for portfolio strategy, implementation, day-to-day management, and operations. This service is not offered in Hong Kong.

2

Advisory Services

For clients with significant investment staff or who wish to be actively involved in investment decisions, we augment their in-house resources with our robust manager networks and provide recommendations on asset allocation, portfolio structure, and manager selection.

3

Asset Class Mandates

For clients who wish to leverage our specialized investment skill and manager networks in private equity, hedge funds, real assets, private credit, co-investments, and secondaries, we manage asset class mandates on a discretionary or non-discretionary basis.

Contact Us

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