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Client Brochure

客戶資訊手冊



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Lim Chung Chun, Chairman and CEO
“ Our Solutions are Built on the Principles
of Security, Innovation and Putting
Our Clients’ Interests First. ”



SGX: AIY
(SGX-ST Mainboard Listed)
(新加坡交易所主板上市)

SGD 23.62 Billion AUA
管理236.2億新幣資產
as at 30 Sep 2024
截至2024年9月30日

iFAST | The leading wealth management fintech platform in Asia

奕豐 | 亞洲領先財富管理金融科技平台

Founded in 2000, iFAST Corporation Ltd. ("iFAST Corp") is headquartered in Singapore and was listed on the SGX-ST Mainboard in December 2014.

One of iFAST Corp's corporate shareholders is Cuscaden Peak Pte Ltd, a company formed by a consortium comprising Tiga Stars Pte. Ltd. (a subsidiary of Hotel Properties Limited), Adenium Pte. Ltd. (a wholly-owned subsidiary of CLA Real Estate Holdings Pte Ltd) and Mapletree Fortress Pte. Ltd. (an indirect, wholly-owned subsidiary of Mapletree Investments Pte Ltd).

iFAST Corp and its group companies (collectively known as "iFAST") are also present in Hong Kong, Malaysia, China and the United Kingdom to provide a comprehensive range of investment products and services to financial advisory firms, financial institutions, banks, multinational companies, as well as retail and high net worth investors in Asia. The Group offers access to over 24,500 investment products including unit trusts, bonds and government securities, stocks and exchange traded funds; while services offered include online discretionary portfolio management services, research and investment seminars, financial technology (fintech) solutions, banking, pension administration, investment administration and transactions services.

*Entities in Hong Kong hold a Type 1, Type 4, and Type 9 license issued by the SFC of Hong Kong, please refer to 'Contact us' section for details.

奕豐集團有限公司（下稱「奕豐集團」）成立於2000年，總部設於新加坡，於2014年12月在新加坡交易所主板上市（股票代碼：AIY）。

奕豐集團的其中一名企業股東是 Cuscaden Peak Pte Ltd，一家由 Tiga Stars Pte. Ltd.（Hotel Properties Limited 旅店置業旗下子公司）、Adenium Pte. Ltd.（CLA Real Estate Holdings Pte Ltd 凱騰控股全資子公司）及 Mapletree Fortress Pte. Ltd.（Mapletree Investments Pte Ltd 豐樹產業集團間接全資子公司）所組成的財團。

奕豐集團扎根於新加坡，和集團旗下公司（下列共同稱為「奕豐」）業務據點同時涵蓋香港、馬來西亞、中國及英國，為亞洲地區各大財富顧問公司、金融機構、銀行、跨國公司，以及零售投資者和高淨值人士提供全方位的投資產品和平台服務。集團平台上匯集超過 24,500 隻投資產品，其中就包括單位信託基金、企業債券及政府債券、股票及交易所買賣基金；平台提供的服務範圍亦涵蓋網上全權委託投資組合管理服務、研究和投資培訓、金融科技解決方案，銀行業務，退休金管理，以及投資行政管理和交易服務等。

*奕豐於香港透過不同的實體持有證監會批出的第一類、第四類及第九類牌照，請參閱「聯絡奕豐」有關奕豐持牌機構的細節。



Recognition from the industry 榮譽與獎項

2018 | NOVEMBER | 11月

iFAST Financial China received the “Best Mutual Fund Sales Agency” Award at the 2018 Mutual Fund Summit and Golden Tripod Awards Ceremony organised by National Business Daily.

奕豐基金銷售（中國）在《每日經濟新聞》主辦的2018公募基金高峰論壇暨公募基金·金鼎獎頒獎典禮中，榮膺“2018中國基金金鼎獎-最佳公募基金銷售機構”獎。

2021 | MARCH | 3月

iFAST Corp was ranked within the “Asia-Pacific High-Growth Companies 2021” list compiled by Financial Times in partnership with Nikkei Asia and research firm Statista.

奕豐集團獲列入《金融時報》與日經亞洲及全球研究公司Statista合編的“2021年亞太地區高增長企業500強”名單。

2021 | OCTOBER | 10月

iFAST Corp was awarded runner-up of the “Most Transparent Company Award 2021 - Financials” and “Shareholder Communication Excellence Award 2021 - Mid Cap” at the SIAS Investors’ Choice Awards 2021.

奕豐集團於新加坡證券投資者協會（SIAS）2021年度“投資者的選擇”獎榮獲“最透明企業獎-金融業”及“卓越股東溝通獎-中盤股”。

2021 | NOVEMBER | 11月

iFAST Corp was awarded the Corporate Excellence and Resilience Award for companies with market capitalisation of S\$300 million to less than S\$1 billion (as at 31 December 2020) at the Singapore Corporate Awards 2020/2021.

奕豐集團於2020/2021年新加坡企業獎獲頒企業卓越和韌性獎（截至2020年12月31日市值為3億至10億新元的公司組別）。

2023 | SEPTEMBER | 9月

iFAST Corporation received the “Highest Returns to Shareholders Over Three (3) Years” and “Highest Weighted ROE Over Three (3) Years” awards in the Banking & Investment Services, Insurance, and Fintech & Infrastructure Sector category at The Edge Singapore Billion Dollar Club 2023.

奕豐金融（香港）於2023年香港商業科技卓越獎（Hong Kong Business Technology Excellence Awards 2023）榮獲“API-金融科技”及「財富科技-金融服務」獎項。

2023 | NOVEMBER | 11月

iFAST Financial (Hong Kong) received the “API - Financial Technology” and “WealthTech - Financial Services” awards at the Hong Kong Business Technology Excellence Awards 2023.

奕豐集團在《The Edge Singapore》主辦的「Billion Dollar Club 2023」中，獲頒銀行及投資服務、保險及金融科技與基建業組別的「最佳股東收益（三年期）」、「最佳加權股本回報率」獎項。



Rich experience in clients' assets administration 在亞洲具備豐富客戶資產行政管理經驗

Client Assets

A separate legal entity, iFAST Nominees (HK) Limited ("IFN"), is set up to segregate and safekeep client assets. Key segregated accounts under IFN are maintained through three note-issuing banks, namely Standard Chartered Bank, Hong Kong and Shanghai Banking Corporation and Bank of China (Hong Kong).

In the unlikely event that iFAST faces financial stress, such segregation ensures neither the banks nor the creditors of iFAST have any rights to set-off or counterclaim against clients' monies and/or securities held in the segregated accounts.

iFAST has strict policies and procedures to provide a safe and reliable transaction platform for its clients and ensure clients' assets are independent from the company's commercial and operational risks.

Pension Schemes Administration

iFAST are in the forefront of providing pension and retirement services in the Asia Pacific.

In particular, we are a registered Investment Administrator for the Singapore CPF Investment Scheme and also a pension and occupational retirement service provider for millions of members and institutional clients in Hong Kong, Singapore and Malaysia.

客戶的資產

我們成立了奕豐代理人（香港）有限公司（“奕豐代理人”）收取及持有客戶資產，其名下的獨立帳戶設立於香港三大發鈔銀行——渣打銀行、香港上海滙豐銀行及中國銀行（香港）。

雖然奕豐鮮有面臨財政壓力，但將客戶資產獨立存放，可保證不論銀行或奕豐的債權人均無任何權利抵銷獨立帳戶內的款項及／或證券或就有關款項及／或證券提出反申索。

奕豐制定了嚴格政策和運作流程，為客戶提供安全可靠的交易平台，保證客戶資產可完全獨立於奕豐的商業及營運風險。

多國退休計劃行政管理人

奕豐一直走在公積金以及退休服務的前線。

在新加坡，我們為公積金（Central Provident Fund）投資計劃的註冊投資行政管理人。同時奕豐為當地、香港以及馬來西亞的各機構客戶及數百萬以上的成員提供退休計劃的行政及資訊科技服務。



Vision behind iFAST Global Prestige

奕豐寰宇在財富管理的願景

As Asia powers its way into the global economic elite, the number of high net worth individuals (HNWIs) is growing rapidly. The high street private banking model has lost its luster to a more personalized and non-transactional wealth management model. HNWIs have varying financial needs which are often complex and require extensive research and analysis. The demand for sophisticated investment products and private banking-type of services without the hidden and exorbitant fees has mushroomed rapidly. We also believe Wealth Advisers can and should have access to a platform which provides all the services they need, so that they in turn can provide the best level of service to their clients.

iFAST Global Prestige powered by iFAST Financial (HK) Limited ("IFHK") and iFAST Securities (HK) Limited ("IFS") is here to meet the needs of both Wealth Advisers and HNWIs in the region. We believe in the ongoing pursuit of the finest products helmed by the most talented managers with a sterling track record, as well as a broader universe of asset classes so that Wealth Advisers can capitalize on windows of opportunities and add real value to their clients. This explains why the platform constantly sources investment products proactively to cater to the different needs of the HNWIs.

亞洲地區作為一股不容忽視的全球經濟動力，隨之而來的是湧現更多需要專業投資建議的高淨值人士。在財富管理的趨勢中，我們留意到客戶對財富管理的需求日新月異，可能與一般私人銀行所提供的服務漸行漸遠。相較之下，非純交易模式而具個性化的管理服務會更貼近客戶的實際需求，更有深度的研究分析而非公式化的銷售技巧亦是長遠保持客戶滿意度的重要元素。收費方面，客戶所追求的高透明度在一般私人銀行中可能有所欠缺。而對此由奕豐金融（香港）有限公司（下稱「奕豐金融」）及奕豐證券（香港）有限公司（下稱「奕豐證券」）共同提供之奕豐寰宇的優勢在於提供按照合理收費水平的財富管理平台，以協助高淨值人士管理資產。

我們深信持續在市場上挑選優秀的產品，如分析投資或基金經理的管理能力，過去之收益表現，以及搜羅更廣泛的資產類別的產品，絕對讓財富顧問更輕易為投資者運籌帷幄以及為客戶增添真正的價值。

Mission Statement
“ To Help Investors around the World
Invest Globally and Profitably ”

Our Group's business divisions 集團業務



Investment Platform for HNWIs

iFAST Global Prestige (iGP) platform is an extension of iFAST Central platform, designed to cater to the specific requirements of high net worth individuals, as well as the wealth advisers servicing them. The platform was launched in 2009 in Singapore and in 2010 in Hong Kong.

(Please refer page 17 for more details on Benefits of iFAST Global Prestige)

專為高淨值富裕人士而設的投資平台

iFAST Global Prestige，簡稱iGP奕豐寰宇平台，乃iFAST Central 平台的延伸，專為滿足高淨值富裕人士及其財富顧問的需求而特別創立。奕豐寰宇平台先在2009年於新加坡創建，並在翌年2010年於香港創立。

(請參閱第17頁了解更多奕豐寰宇的優勢)



The leading platform for FAs and financial institutions

As a premier wealth management platform, iFAST Central provides a comprehensive range of services, including investment administration and transactions services, research and trainings, IT services and backroom functions to banks, financial advisory (FA) firms and financial institutions.

為理財顧問及金融機構提供專屬服務的領先投資平台

作為首屈一指的財富管理平台，iFAST Central（奕豐匯富）投資平台為各大銀行、理財顧問公司及金融機構，提供全方位的投資平台服務，範圍涵蓋行政管理及交易、研究和投資培訓、資訊科技及後勤服務，包羅萬有。



Financial regulations and IT changes are creating an environment where businesses have to quickly adapt relevant to their clients. The iFAST Fintech Solutions business division has been created to capture the business opportunities and provide innovative fintech solutions to our clients.

金融業的監管和科技的發展已形成企業必須迅速順應的大環境，從而繼續確保業務對客戶依然合時宜。

為此，奕豐新創立了金融科技方案業務部，旨在捕捉市場上的業務機會，為客戶提供創新的金融科技解決方案。



iFAST ePension provide pension administrative services and white labelled solutions for scheme sponsors, trustees and other institutions, with a focus on Hong Kong MPF Schemes and ORSO (Occupation Retirement Scheme Ordinance) schemes.

奕豐退休易以香港強積金計劃和職業退休計劃條例為重點，為退休金服務商、管理人及其他企業提供行業數碼轉型及退休金行政管理服務。

Bondsupermart

Provides research, tools and information of over 2,000 bonds, for investors and Wealth Advisers. This initiative to create a dedicated bond information portal is to help investors around the world find crucial bond information that has so far been difficult to obtain.

專為投資者及理財顧問提供平台上超過2,500只不同債券的研究分析、工具及相關資訊。設立專屬的債券資訊平台是為了協助環球投資者可輕鬆掌握原本難以獲取的債券資訊。



iFAST Fund Management partners fund managers and other financial players to help them deliver innovative and cost-efficient products and investment solutions.

奕豐基金管理與基金經理和其他金融機構合作，幫助他們提供創新且具有成本效益的產品和投資解決方案。



iFAST TV is an investment-focused digital video channel committed to creating relevant, informative and engaging content for all investors. We see iFAST TV as a natural extension of our fintech-driven and investor-focused business as we continually seek to better serve, educate and engage our investors.

iFAST TV是一個以投資為重點的數碼視頻頻道，致力於為所有投資者創造與投資相關、信息豐富且引人入勝的視頻內容。iFAST TV也是奕豐以金融科技驅動和以投資者為中心業務的延伸，從而繼續更好地服務、教育和吸引投資者。



IFHK is a subsidiary of iFAST Corp which is also the holding company of iFAST Global Bank, a licensed bank in the United Kingdom, aspiring to provide global banking connectivity to customers, corporates and financial institutions around the world.

奕豐金融之母公司為奕豐集團，而該集團亦為奕豐環球銀行之控股公司，該銀行是一家英國的持牌銀行，致力於為全球客戶、企業和金融機構提供全球銀行服務。



Safety of your assets 資產安全保障

iFAST Financial (HK) Limited and iFAST Nominees (HK) Limited is licensed under the Securities & Futures Commission (SFC) of Hong Kong to provide custodial services, including the safeguarding and administration of client assets. In doing so, iFAST has to adhere to stringent regulatory requirements, with duties such as:

- Keeping clients' securities and money segregated from the company's;
- Proper handling of clients' securities and money received; and
- Provision of contract notes and account statements.

Your securities and money will be kept in segregated client trust accounts, which are used to facilitate transactions. We have in place strict policies and procedures including risk management, internal audit and compliance, to provide a safe and reliable transaction platform for our clients.

奕豐金融（香港）有限公司及奕豐代理人（香港）有限公司持有香港證券及期貨事務監察委員會（證監會）所發出的牌照，可為客戶提供證券託管服務，服務內容包括維護和管理客戶資產。為此，奕豐必須遵守嚴格的監管要求並履行以下職責：

- 將客戶的證券和資金與公司本身的證券和客戶款項分開打理；
- 妥善打理客戶投資的證券與交付的投資金；及
- 提供成交單據和賬戶結單。

您的證券和資金將存放在我們的客戶託管賬戶內，該賬戶亦用於執行證券交易。此外，我們還制定了風險管理、內部審計及合規審查等方面的嚴格政策和運作流程，從而為客戶提供一個安全可靠的交易平台。



Transparency builds trust; Trusted partners grow wealth

建立互信 寰宇投資

Wealth Advisers, who understand you and your family's needs, have the aligned interest to grow your wealth in the long term. By partnering with iFAST, you and your Wealth Advisers may access to a wide range of investment assets and have them safe kept.

Lasting relationship through dedication

With greater transparency on iGP, you can access to timely information of your portfolios, which contain different investment assets. Wealth Advisers take pride in themselves for growing wealth for you and your family by capturing investment opportunities at a good timing.

Your core principles match with Your investing styles

Wealth Advisers are entrusted to design investment portfolios that match with your principles. Not only your investment objectives are taken care of but also having rooms for you to develop convictions for long term investment.

For instance, you may have views towards some unique fund strategies or appetite for regular cash flow in certain sectors/industries/special features. To ensure your Wealth Advisers and you are well informed when making investment decisions, iFAST has also devoted massive resources to conduct research analysis on different asset classes as well as collaborating with external investment professionals to co-host events about investments.

(Investment involves risks and past performance is not a guarantee of future returns)

財富顧問了解客戶/客戶家庭的喜好、投資目標、風險程度等制定貼心的投資組合。而透過奕豐寰宇執行投資策略，可享奕豐自身透過多種渠道取得最新資訊，讓投資者緊貼市況。

客戶與財富顧問跟市場的競賽就有如一場長跑，以至誠態度攜手成長

奕豐平台提供高透明度的財富策劃，讓客戶隨時隨地查閱自身組合。財富顧問則以增值客戶財富為己任，確保客戶在正確時機投資，實現投資目標，例如增加現金流及資本增值。

確保客戶投資風格與其目標相乎，以專業知識引領客戶走得更遠

一般財富顧問只將客戶的風險取向機械式地與投資風格配對。但在奕豐，財富顧問所擁有的豐富閱歷及專業知識客戶可為客戶量身訂造獨有的投資組合，拼出具長線增加現金流及資本增值的計劃，引領客戶走得更遠。

個別客戶可能對不同基金風格持不同的看法，亦有不少客戶主要尋求穩定的現金流。對此，我們不但保持與各大基金公司的合作，同時我們投放大量資源在各資產類別的研究，確保財富顧問與客戶手握豐富而具建設性的資訊，在作投資決定時更得心應手。

(投資涉及風險，過往回報並不保證未來表現)



Benefits of iFAST Global Prestige

奕豐寰宇的優勢



As a key wealth management centre in Asia, iGP will be the key driver of growth for iFAST as the leading platform of choice in the wealth management industry. Our strategy is simple: we provide Wealth Advisers with the best all-round support, so they can focus on building enduring client relationships and providing quality service and advice. Wealth Advisers are able to submit trades for various investment products such as Unit Trusts, Bonds, Stocks and ETFs using a single platform, and we will consolidate all instructions and send client the consolidated statement for their easy reference. Both Wealth Advisers and clients are able to see consolidated holdings online as well.

作為亞洲的主要財富管理中心，奕豐寰宇作為一主要推動力，讓奕豐成為財富管理行業中首屈一指的平台。我們的策略很簡單：為財富顧問提供最佳的全面支援，讓他們可專注於與客戶建立更持久的關係及提供優質的服務和意見。財富顧問只需透過一個平台，便可提交各種不同投資產品（如基金、債券、股票及交易所買賣基金）的交易指示。我們會綜合所有交易指示，並將所有投資資料集合於一張綜合結單，方便客戶隨時查閱。此外財富顧問及其客戶也能上網綜合查看所有持股及組合資料。

Account features and our wealth planning services

投資戶口特質配合客戶財富策劃

Wrap Account 包管帳戶

A wrap account allows clients to consolidate their investments on all asset classes into one single account, which allows switching between unit trusts and other investment assets more efficiently. With this feature, your Wealth Advisor is able to construct a comprehensive portfolio by having an overview on all assets in the account.

At iGP, you and your family members may choose to have one or more investment accounts for each members. For legacy planning, we also make available investment accounts with Transfer on Death feature or investment accounts which employ special purpose vehicles and/or for corporate financial investment.

包管帳戶讓客戶在同一個帳戶內能同時「包管」各類投資，轉換不同投資產品時亦可享較低的交易費用。同時，財富顧問能輕鬆地全面審視投資組合，從而更有效地完善投資策略。

為滿足不同投資需求的客戶，客戶與其家庭成員可在奕豐寰宇根據個人喜好而選擇開啟一個或多於一個的投資戶口。另外，對於有意計劃財富承傳的客戶，亦可選擇使用「身故權益轉移」、SPV或企業投資為目標開立的投資戶口。

Multi-Currency Cash Management Services 現金管理解決方案 多元貨幣現金賬戶

Cash Solutions enhance efficiency in cash management and increase the flexibility in the management of clients' portfolio needs. When clients park their money in the Cash Solutions, they are able to earn yield even before the Wealth Adviser has decided on a suitable investment allocation. Once the investment choices are made, clients can use the monies from their Cash Solutions to pay for their transactions immediately. There are no lock-in periods and even if the clients' investments are in different currencies, they can use our real-time FX and currency conversion to do the transfer and invest.

現金管理解決方案可提升現金管理的效率，讓財富顧問在管理客戶的投資組合時更具靈活性。客戶將資金暫存於現金管理解決方案後，在財富顧問作出適當的資產配置決定前，他們可從中賺取收益。一旦財富顧問作出投資決定，他們就可以動用現金管理解決方案中的資金立即付款。現金管理解決方案不設鎖定期，即使客戶的投資是按不同貨幣計價，他們亦可使用實時外匯服務兌換交易貨幣，進行轉賬和投資。

Administrative Back-Office Support 行政及後端系統支援

We take care of the administrative work so the Wealth Advisers can take care of their clients. With more than 20 years in the business, we understand the kind of back-end support that is needed for a Wealth Adviser. We have a strong operational team to assist the Wealth Advisers so that clients' account opening and transactions are performed seamlessly.

我們會負責處理行政工作，讓財富顧問可以全心照顧客戶所需。奕豐在業界屹立超過20年，深切了解財富顧問對各種後勤服務的需求。奕豐的運營團隊將為財富顧問提供全面支援，讓其客戶的開戶申請和交易流程更加順暢無阻。

Research and Investment Planning Support 研究和投資規劃支援

We take a stringent approach towards investment products onboarding and conduct our own independent research on macroeconomics, markets and securities. Our in-depth analysis encompasses Unit Trusts, Bonds and other investment products; from time to time we also invite investment professionals from fund houses to share insights and strategies with Wealth Advisers through different channels.

投資格局千變萬化，奕豐寰宇絕不讓客戶及財富顧問孤身面對。作為客戶在財富策劃的最強後盾，奕豐研究團隊一直保持嚴格的產品上架程序並採取獨立的宏觀經濟、市場及證券研究分析。多年的研究經驗使奕豐對各類投資產品包括基金及債券能作出深入而全面的分析。與此同時，為確保財富顧問比普羅大眾領先一步，奕豐不時會聯同或邀請不同基金公司的投資專家作市場/投資策劃分享。

Fee Transparency & Savings 公開透明的定價結構和節省成本

Clients pay no or low switching fees when the Wealth Adviser makes switches between fund investments. The transparency and competitiveness of fees, as opposed to more complicated investment structures (e.g. lock-in period and surrender charge) is also important as fees can substantially erode a client's longer-term returns.

當財富顧問進行基金轉換時，客戶可享有較低的轉換費用，或免費進行基金轉換。相較於其他較複雜投資產品的收費制度（例如：設有投資鎖定期或提前贖回費），平台的定價結構公開透明且具競爭力，可協助客戶節省更多投資成本，這是因為積累起來的交易費用將會侵蝕客戶的投資收益。

Regular Savings Plan (RSP) 定期儲蓄計劃

Whether clients are planning for their children's education or for their retirement, implementing an RSP is a useful way to achieve their financial goals. This instils a disciplined approach for clients to invest their savings regularly, and also allows clients to take advantage of dollar cost averaging across volatile market periods. If investment plans change, clients can stop or change their RSP anytime as there is no lock-in period.

無論是為退休規劃或為孩子教育費做準備，定期儲蓄計劃都有助於您實現財務目標。定期儲蓄計劃能讓您通過有紀律的方式進行投資，並運用平均成本法策略平穩渡過市場的動盪時期。由於定期儲蓄計劃不設鎖定期，因此即使投資計劃有變，客戶也能隨時終止或更改定期儲蓄計劃。



Enhanced product offerings

產品選擇更多樣化

UNIT TRUSTS 基金

We have over 1000 unit trusts from over 80 global and regional fund houses are onboard. Investing in unit trust helps investors diversify their investment thereby lowering their concentration risk.

上架的1000多隻基金來自超過80個全球以及區域的基金公司，助投資者減低投資單一證券的風險及獲得專業團隊的優勢例如風控系統。

BONDS & CDS 債券及存款証

As part of iFAST expansive eco-system, iFAST's dealing desk for both OTC and exchange traded products is helping you to achieve better execution in terms of more favourable pricing higher certainty, greater transparency, wider choices, and strengthened negotiation power to clients' benefits.

奕豐證券交易部在維護客戶現有利益的同時為求盡善盡美，我們致力在交易時為客戶帶來更優惠以及高透明度的報價。我們坐擁超過30個交易對家， 因此不論對於交易所上市抑或場外交易的證券，我們可為客戶提供更多的產品選擇並具強勁的議價能力。而尤其在債券此類場外交易的投資產品中更顯優勢。

STOCKS & ETFs 股票、交易所買賣基金

Participate in HK IPOs or secondary trading of thousands of stocks in China-A shares, HK, Singapore, the U.S. and more.

As a rapidly evolving investment product, ETF no longer contains only passive indexing strategy but actively managed products are also present in HK, Shanghai and Shenzhen, Singapore and US Exchanges, across fixed income, equity, and other sectors.

參與但不限於港股新上市並對二手市場中上市的企業（包括港交所、紐交所、納斯達克交易所、上交所及深交所、新交所）進行股票及交易所買賣基金的操作。

交易所買賣基金不再局限於被動式管理。在奕豐，投資者可於香港、中國、新加坡及美國各交易所中找到主動型管理的產品，並橫跨各資產類別。

PRIVATE FUNDS 另類投資

HNWIs will also be able to trade wholesale bonds in odd lot sizes from just US\$5,000 via Bond Express.

Carefully selected alternative investment such as Equity Long/ Short, LIBOR+, Global Technology Long/Short, Trend Following Strategy, Precious Metals and etc. are examples.

高淨值人士也可通過債券快線以低至5,000美元的投資額執行批發債券的零股交易。

平台雖以零售基金為主，但高淨值人士在奕豐寰宇（iGP）更可接觸到不少的另類投資產品，例如長短倉股票基金、LIBOR+以及貴金屬等等。



Interactive and informative investing tools 互動性強且資訊豐富的投資工具

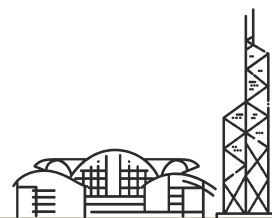
With the convenience of the internet and our FinTech solutions, Wealth Advisers are able to submit transactions, monitor investments, access to clients' account statements and view investment-related information through our secure website or mobile app 24/7. Clients are able to approve trades using the client's login, and are also able to see the performance of their investments and access their account statements. This allows Wealth Advisers to serve clients more efficiently, and also empowers advisers to serve clients across the globe.

基於互聯網所帶來的便利，以及平台高效能的金融科技解決方案，財富顧問可以隨時隨地登入奕豐的加密網站或移動應用程式，為客戶提交交易指示、跟進和監控投資表現、查閱客戶的賬戶結單及與投資相關的信息等，輕鬆掌握投資組合的概況。此外，客戶也能以私人密碼登入並批核有關交易，查閱賬戶結單及投資組合的表現。這有助於提升財富顧問的效率，讓他們可以騰出更多時間為客戶提供更佳服務，且不受地域阻隔。

Our Group's licences

集團持有的牌照

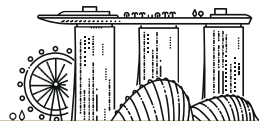
HONG KONG



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奕豐金融（香港）有限公司及奕豐環球市場（香港）有限公司持有由香港證券及期貨事務監察委員會（證監會）所發出的第一類、第四類及第九類牌照，並且是香港強制性公積金計劃管理局（MPFA）的註冊會員。奕豐證券（香港）有限公司則持有證監會所發出的第一類牌照，並且是香港聯合交易所（SEHK）和香港中央結算所有限公司（HKSCC）參與者，以及中華通交易所和結算參與者。奕豐保險經紀（香港）有限公司持有由香港保險業監管局（Insurance Authority）所發出的保險經紀公司牌照，並且是香港強制性公積金計劃管理局（MPFA）的註冊會員。

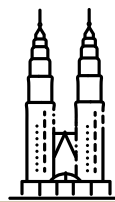
SINGAPORE



iFAST Financial Pte Ltd (Singapore), the Singapore business division of iFAST Corporation, holds the Capital Markets Services Licence and Financial Advisers Licence issued by the Monetary Authority of Singapore (MAS), and is an Exempt Insurance Broker registered with MAS. It is also a Central Provident Fund Investment Scheme (CPFIS)-registered Investment Administrator, CDP Depository Agent, Trading Member of SGX-ST, and Clearing Member of CDP.

奕豐金融（新加坡）私人有限公司持有新加坡金融管理局（簡稱“金管局”）所發出的資本市場服務牌照及理財顧問牌照，並且是金管局的註冊豁免保險經紀（Exempt Insurance Broker）。同時，亦是公積金投資計劃的註冊投資管理人，以及中央託收公司（CDP）的託收代理、新加坡交易所（SGX-ST）的交易會員以及中央託收公司的結算會員。

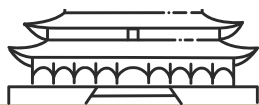
MALAYSIA



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CHINA



iFAST Financial China Limited holds the Funds Distributor Qualification from the China Securities Regulatory Commission (CSRC). It is also an Associate Member of Asset Management Association of China (AMAC) and a Member of the Shenzhen Asset Management Association (SZAMC). iFAST Investment Management China Ltd is a Registered Private Fund Manager with AMAC.

奕豐基金銷售有限公司（前稱“奕豐金融服務（深圳）有限公司”）持有中國證監會發出的“證券投資基金銷售業務資格”。同時，亦是中國證券投資基金業協會（Asset Management Association Of China, AMAC）聯席會員及深圳投資基金同業公會（Shenzhen Asset Management Association）會員。奕豐投資管理中國有限公司是中國證券投資基金業協會（AMAC）的註冊私募基金經理。

UNITED KINGDOM



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*iFAST Global Bank is not an authorized institution in Hong Kong

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*奕豐環球銀行並非香港認可機構



Contact us

聯絡奕豐

iFAST Financial (HK) Limited
Suites 702, Tower 5, The Gateway,
Tsim Sha Tsui, Kowloon, Hong Kong

奕豐金融（香港）有限公司
香港尖沙咀港威大廈第5座7樓702室

+852 3766 4334
service@ifastgp.com
www.ifastgp.com.hk

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