

# Accelerating Growth through Building Custom Portfolios

**Capitalising on Hong Kong's unique position, Cambridge Associates is committed to achieving strong performances in its clients' long-term investment portfolios, and driving business growth in Asia.**

With close to 50 years of institutional and family office investment experience, Cambridge Associates is a global investment firm with offices in key markets in North America, the United Kingdom, Europe, Asia, and Oceania. In Asia, the company established its newest office in Hong Kong in 2021 – which has been issued the Type 4 Regulated Activity licence by the Securities and Futures Commission of Hong Kong, and is licensed to conduct the regulated activity of advising of securities to professional investors – to complement its operations in Beijing and Singapore. The firm offers a range of services including outsourced chief investment officer, non-discretionary portfolio management, staff extension, and alternative asset class mandates to clients such as family offices, private clients, endowments and foundations, pension plans, and other institutional investors around the world.

## Global Expertise with Local Insights

"Asia has historically been a significant market for Cambridge Associates, and we are committed to the region, having been here for over 20 years. Hong Kong – a regional financial hub boasting deep capital markets, a low tax regime, and strong talent pool – is the latest step in our strategy to give existing and potential clients in this region greater access to the investment experience and services for which we are known," explained Edwina Ho, Senior Director, Cambridge Associates, who is based in Hong Kong.

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**Edwina Ho**  
**Senior Director**  
**Cambridge Associates**

Combining our company-wide resources and the capabilities of our local teams, we are able to provide both global and regional investment opportunities to our clients in Asia. Being side-by-side with our clients in this dynamic region will enable us to serve them in more immediate and targeted ways. Leveraging our proven track record, we continue to see strong demand in Asia for our investment services and global investment networks, especially in Hong Kong and Mainland China," Ho said.

## Family Offices Poised for Expansion in Asia

As the number of ultra-high-net-worth individuals and family offices is expected to grow in Asia, Mary Pang, Head of Global Private Client Practice, Cambridge Associates, shared her observations on this trend and how the firm can help to meet their investment needs. "There is a generational transition of wealth taking place in Asia at the moment, which sees wealthy families shifting their focus towards managing diversified pools of investment assets, as well as managing their core business," Pang said. "As part of this transfer, we are also seeing increased interest in socially responsible endeavours and impact investing from our clients. We look forward to working closely with them, to help them build customised investment portfolios that can deliver a positive and sustainable impact."



## Hong Kong Enjoys Strategic Location

Hong Kong has an open and supportive business environment, which enables Cambridge Associates to further its business objectives by partnering with local organisations such as InvestHK. When asked about the company's decision to choose Hong Kong as a location for its new office, Ho added, "Hong Kong is a premier business hub in Asia, and is in close proximity to Mainland China. This ideal location allows Cambridge Associates to better serve its clients in Hong Kong and Mainland China."

## Cambridge Associates

- Founded in 1973 and headquartered in Boston
- A global investment firm that helps endowments and foundations, pension plans, high-net-worth investors, family offices, and other institutional investors to implement and manage customised investment portfolios
- Over US\$600 billion in assets under management or advisement as of 31 December, 2021

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