

investment advisory service

*Investment advice supported by sound research forms the
basis of the individual securities included in a client's portfolio.*

investment advisory service

We offer an investment advisory service designed for clients wishing to have an active involvement in all investment matters and retain ultimate responsibility for taking investment decisions. We will help clients define their investment objectives, establish a risk profile and determine their ultimate investment requirements. This will form the basis of our working relationship with clients and we will provide ongoing advice and guidance on all investment matters.

Your investment consultant is committed to building a personal relationship with you, exchange ideas, keep you informed of market developments and new opportunities and most importantly, be there when you need him/her.

Our investment advisory service applies for local securities as well as international bonds and shares. While our in-house research team formulates recommendations for our investment consultants with respect to securities listed on the Malta Stock Exchange, we source research on foreign securities through reputable investment houses overseas.

benefits of this service

The main features of this service include:

- Clients retain control over the management of their investments
- Independent advice
- Flexibility with respect to choice of investment instruments
- Access to international stockmarkets
- Access to all our local market research and information
- Comprehensive reporting
- Management of assets on a nominee basis (optional but recommended) – refer to nominee service fact sheet for further information.



An investment advisory service fee applies and is dependent on the investment objectives and size of the portfolio. Further information may be obtained on request.