

deVere Investment

# DFM Service

for Professional Investors

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Customised Investment Management  
for **High-Net-Worth** and  
**Ultra High-Net-Worth** Individuals

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## Introduction

deVere Investment recognises the unique requirements of professional investors and offers a tailored Discretionary Fund Management (DFM) service for high-net-worth and ultra-high-net-worth individuals. This document outlines the benefits of choosing deVere Investment your DFM provider and explains our approach to investment management, providing insights into the key features of our service.



The purpose of this document is to provide professional investors with a comprehensive understanding of our DFM service. It highlights how we customise investment strategies, enhance decision-making involvement, and deliver personalised solutions to help you achieve your financial objectives.

deVere Investment is the largest private banking company in Mauritius, which specialises in providing investment solutions and wealth management services to high-net-worth and ultra-high-net-worth individuals. With our expertise and Mauritius based advisors, we are committed to delivering exceptional investment management solutions.

# Understanding the deVere Investment DFM Service



## What is DFM?

**Discretionary Fund Management (DFM)** is an investment service in which an experienced investment manager makes investment decisions on behalf of the client. Our DFM service for professional investors provides a high level of customisation and involvement in the decision-making process.

## Benefits of DFM for Professional Investors



**Expertise and Knowledge:** Our experienced investment managers possess in-depth knowledge of global financial markets and investment strategies, ensuring informed decision-making to optimise returns.

**Customisation and Flexibility:** We tailor investment strategies to align with your specific investment goals, risk tolerance, and preferences, providing a personalised investment approach.

**Enhanced Decision-Making Involvement:** As a professional investor, you have the opportunity to participate in the investment decision-making process actively, leveraging our expertise and insights.

## Our Approach to DFM Services

At deVere Investment, we believe in a client-centric approach to DFM services. We collaborate closely with clients, their local investment consultants, and our Mauritius-based advisors to create personalised investment strategies. This collaborative approach ensures that clients have access to a wide range of investment options and benefit from our collective expertise.

# Open Architecture Investment Management

## Exploring the Open Architecture Model

Our open architecture investment management approach allows clients to benefit from a broad range of investment opportunities. We collaborate with reputable asset managers and financial institutions worldwide, enabling us to provide access to diverse asset classes, investment styles, and geographic regions.

### Collaboration with Local Investment Consultants

We work in partnership with clients' local investment consultants, respecting their expertise and knowledge of the local market. Through this collaboration, we combine global investment insights with local insights, optimising the investment portfolio to achieve the best possible outcomes for our clients.

### Involvement of Mauritius-Based Advisors

Our Mauritius-based advisors play a crucial role in the DFM service, providing guidance, expertise, and oversight. They work closely with clients and their local investment consultants to ensure that investment decisions align with the client's goals and risk appetite while adhering to regulatory requirements and best practices.



# Customised Investment Management for Professional Investors

## Enhanced Decision-Making Involvement

As a professional investor, we recognise your expertise and value your input. Our DFM service allows you to have a higher level of involvement in the investment decision-making process. We consider your insights, preferences, and risk appetite, combining them with our expertise to create a well-informed investment strategy.

## Tailored Investment Strategies

We understand that professional investors often have sophisticated investment needs. Our investment managers work closely with you to design customised investment strategies that align with your specific objectives, risk tolerance, and market outlook. This tailored approach ensures that your portfolio reflects your unique investment preferences and objectives.



## High-Net-Worth and Ultra-High-Net-Worth Portfolio Construction

Our DFM service for professional investors focuses on constructing portfolios that are well-diversified, dynamic, and tailored to your risk profile. We leverage our expertise and access to a wide range of asset classes and investment opportunities to create portfolios that align with your financial goals while managing risk effectively.

# Key Features of the deVere Investment DFM Service



## Personalised Investment Solutions

We provide personalised investment solutions tailored to your individual requirements, risk tolerance, and investment goals. Our investment managers work closely with you to design portfolios that reflect your preferences and aspirations, ensuring a customised investment experience.



## Collaboration with Local Investment Consultants

We work in partnership with clients' local investment consultants, respecting their expertise and knowledge of the local market. Through this collaboration, we combine global investment insights with local insights, optimising the investment portfolio to achieve the best possible outcomes for our clients. We value your expertise and actively involve you in the investment decision-making process. Our investment managers leverage their knowledge and insights, combined with your input to make informed investment decisions. This collaborative approach ensures that your portfolio aligns with your objectives and risk appetite.



## Involvement of Mauritius-Based Advisors

Our Mauritius-based advisors play a crucial role in the DFM service, providing guidance, expertise, and oversight. They work closely with clients and their local investment consultants to ensure that investment decisions align with the client's goals and risk appetite while adhering to regulatory requirements and best practices.



## Expert Investment Management

Our team of experienced investment managers possess extensive knowledge and expertise in global financial markets. They actively monitor market trends, conduct in-depth research, and execute investment strategies designed to optimise returns and manage risks.



## Robust Risk Management Framework

We prioritise risk management and have a robust framework in place to monitor and mitigate investment risks. Our risk management strategies aim to preserve capital, manage volatility and protect your investment portfolio from potential market downturns. We continuously monitor and adjust portfolios based on evolving market conditions and your changing risk profile.



## Why Choose deVere Investment for DFM Services?

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### Specialised Expertise for Professional Investors

deVere Investment has extensive experience in providing investment solutions to professional investors. Our team of specialists possesses in-depth knowledge of complex investment strategies and understands the unique needs of high-net-worth and ultra-high-net-worth individuals. We are committed to delivering tailored solutions that align with your financial objectives.

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### Customised Approach to Investment Management

We believe in a personalised approach to investment management. Our DFM service allows you to actively participate in the investment decision-making process and provides customised investment strategies that align with your specific goals, risk tolerance, and preferences.

### Comprehensive Investment Solutions

As a professional investor, you can benefit from our comprehensive range of investment solutions. We offer access to diverse asset classes, including equities, fixed-income, alternatives, real estate, and more. Our aim is to provide you with a well-diversified investment portfolio that captures potential opportunities across global markets.

### Confidentiality and Discretion

We understand the importance of confidentiality and discretion when managing high-net-worth and ultra-high-net-worth portfolios. deVere Investment adheres to strict privacy policies and maintains the highest level of confidentiality in all client interactions. Your financial information and investment details are treated with the utmost care and professionalism.

# Getting Started with the deVere Investment DFM Service

## Initial Consultation and Investment Objectives

We begin our DFM service by conducting an in-depth consultation to understand your investment objectives, risk tolerance, and preferences. Our investment managers work closely with you to define your investment goals, outline your desired level of involvement, and establish the framework for a successful partnership.

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## Detailed Investment Strategy Development

Based on your investment objectives, risk profile, and preferences, our investment managers develop a detailed investment strategy that aligns with your requirements. We present this strategy to you, ensuring transparency and providing an opportunity for discussion and refinement.

## Ongoing Collaboration and Monitoring

Once the investment strategy is implemented, we maintain ongoing communication and collaboration with you. We provide regular updates on the performance of your portfolio, conduct periodic reviews to assess progress, and make adjustments as needed to keep your investments aligned with your goals.





# Frequently Asked Questions (FAQs)

## What is the minimum investment required for the DFM service?

Our DFM service for professional investors requires a minimum investment of \$1 million USD/GBP/EUR. This minimum investment amount ensures that we can provide the level of customisation and personalised attention required for high-net-worth and ultra-high-net-worth portfolios.

## How much input will I have in the investment decision-making process?

As a professional investor, you will have a higher level of input in the investment decision-making process. We value your expertise and actively involve you in the decision-making discussions. Investment decisions are made based on thorough analysis, market research, and collaboration between our investment managers, your local investment consultant, and our Mauritius-based advisors. The decisions aim to align with your investment goals, risk tolerance, and prevailing market conditions.

## How often will I receive updates on my investment portfolio?

We provide regular updates on your investment portfolio's performance and progress. Typically, you can expect quarterly performance reports, which include comprehensive information on investment returns, portfolio allocation, and any changes made. Additionally, we are available to address any inquiries or concerns you may have regarding your investments.

## How are investment risks managed within the DFM service?

At deVere Investment, risk management is a key priority. We have a robust framework in place to monitor and manage investment risks. Our investment managers employ various risk management strategies, including diversification, asset allocation, and ongoing monitoring of market trends. We continuously assess and adjust portfolios based on evolving market conditions and your changing risk profile.



## Conclusion

### Summary of the deVere Investment **DFM** Service

deVere Investment offers a customised DFM service for professional investors with a minimum investment of \$1 million. Our service provides enhanced decision-making involvement, personalised investment solutions, expert management, and a robust risk management framework. We are committed to delivering tailored investment strategies that align with your financial goals and preferences.



## DFM Service for Professional Investors

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To learn more about our **DFM service**  
or to speak with one of our investment  
advisors, please contact us at:

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