CC ADVISORY

INVESTMENT PORTFOLIO MANAGEMENT

THE COMPANY

ONE STOP PROFESSIONAL CENTRE
统辦專業服務中心

CC Advisory Sdn Bhd
(1192416-P)
Fee-based Financial Planning Centre

CC ADVISORY
SDN BHD

WHAT IS CCA INVESTMENT PORTFOLIO MANAGEMENT (IPM)?

CCA Investment Portfolio Management (IPM) is an investment programme with the objective of helping you to achieve your mid to long-term financial goals.

IPM will consider your investment objective and risk appetite. Then, we will take care of your investment gains through active portfolio management, regular rebalancing, optimal fund selection, portfolio diversification and risk management.

WHY IPM?

PERSONAL FINANCIAL ADVISER

CCA is not tied to any financial institutions, allowing us to provide unbiased advice for your best interest.

RESEARCH EXPERTISE

CCA research team adopts disciplined approach and eliminate emotional factors to optimize your gains in the long run.

SAVE TIME & EFFORTS

IPM save you time and free you from all the hassles in finding the right investment products and monitoring your portfolio.

OUR 4 STEPS IPM

01 DEFINE ONE SINGLE LIFE GOAL

02 DIVERSIFY PORTFOLIO THROUGH ASSET ALLOCATION STRATEGY

03 FUND SELECTION THROUGH SCIENTIFIC APPROACH

04 PORTFOLIO REVIEW & REBALANCING

We help you to meet your

LIFE GOALS

CC ADVISORY SDN BHD

TYPES OF CCA INVESTMENT PORTFOLIO MANAGEMENT

01 DIRECT MANDATE PORFOLIO

Choose your desired return and delegates the buy-sell decision making to our research experts based in Malaysia, Singapore, China and Hong Kong.

⋆Suitable for cash lump sum investment.

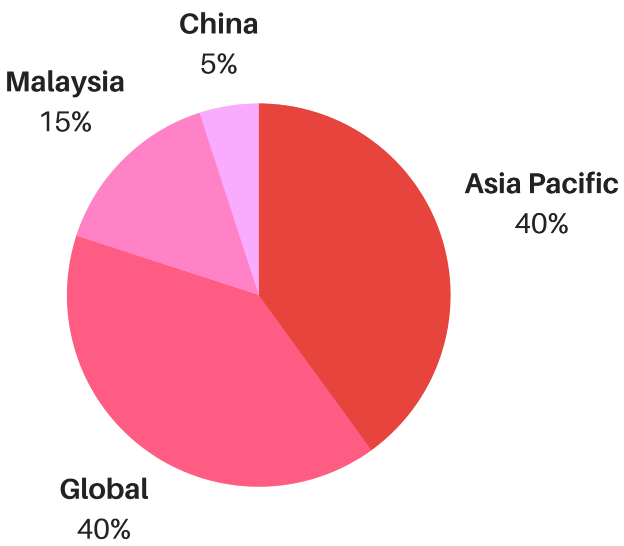
RISK 5% 6% 7% 8% 9% RETURN

02 SELF-CONTROLLED PORFOLIO

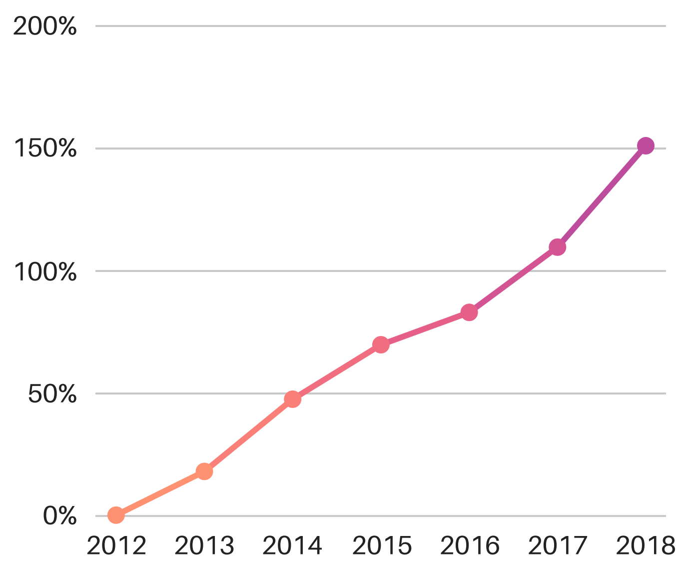
Gain full control of your investment portfolio together with the advice from your personal financial adviser. All investment decisions will only be implemented upon your approval.

⋆Suitable for EPF, cash lump sum & regular saving plan investment.

ASSET ALLOCATION



PAST PERFORMANCE



Source: iFAST Capital Sdn Bhd

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CC Advisory Sdn Bhd ("CCA"), is part of Cheng & Co Group that provides a full range of professional services to the public over 16 locations in Malaysia, Singapore, Hong Kong, China and Australia for more than 20 years.

CC Advisory Sdn Bhd is offering one of the widest ranges of wealth management which includes Islamic Wealth Management and financial planning solutions to benefit our individual and corporate clients. We are licensed by Securities Commissions and Bank Negara Malaysia to provide financial advisory services in Malaysia.

We focus in enriching our client's experience and working with trusted partners to achieve our vision of becoming one of largest independent financial planning centre in Malaysia by year 2020.

OUR PARTNERS

iFAST capital

PhillipCapital

Your Partner In Finance