

SCORPIO PARTNERSHIP'S VINTAGE DASHBOARDS

Scorpio Partnership is making its extensive research database available on a pay-per-use basis. The Vintage Dashboards provide strategic data on the HNW market in 30 different geographies, including market sizing, investor characteristics and competitor landscapes. For certain geographies there is in-depth information on the UHNW market and on technology and reporting requirements.

Each geography has between eight and 17 data points. Full details are listed in the matrix on the following page. This solution is offered in a pdf dashboard format.

Selected data points include:

- Number of HNW individuals
- Growth rate of HNW individuals,
- Magnitude of HNW assets,
- Onshore and offshore distribution
- HNW market sizing, with segments of USD100k-1m, USD1-10m, USD10-50m, USD50m+, USD100m+
- Investor characteristics
- Typical HNW portfolio
- Competitors: domestic & international
- Technology providers
- Client investment behaviour

VINTAGE DASHBOARDS

Vintage Dashboards	Price (GBP)
Single country dashboard	GBP500
5 country dashboards	GBP2,000
6 th and subsequent dashboards*	GBP300
Entire package of 30 geographies	GBP8,500

* in the same purchase

All prices ex VAT

For further details please contact:

Graham Harvey

+44 20 7811 0127

graham@scorpiopartnership.com

Vintage Dashboards		Czech Republic	Hungary	Kazakhstan	Poland	Russia	Turkey	Ukraine	Finland	France	Germany	Ireland	Luxembourg	Portugal	Spain	Sweden	Switzerland	UK	Egypt	GOC	Israel	South Africa	India	Japan	Argentina	Brazil	Canada	Chile	Colombia	Mexico	Venezuela
Available data points:																															
Section A	Typical offshore investments	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓		✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	Investor characteristics	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	Competitors (domestic & intl)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	No of HNW (> USD1m)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	Total HNW assets (> USD1m)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓			✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	HNW growth rate (> USD1m)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	Typical HNW portfolio (> USD1m)	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	HNW market sizing, segments: USD1-10m, USD10-50m, USD50m+	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓				✓	✓			✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	
	No of HNW (> USD100k)	✓	✓		✓				✓				✓	✓		✓	✓	✓													
	HNW assets (> USD100k)	✓	✓		✓				✓				✓			✓	✓														
Section B	Onshore HNW assets (> USD100k)												✓				✓														
	Offshore HNW assets (> USD100k)												✓				✓														
	Onshore HNW growth rate (> USD100k)	✓	✓		✓				✓			✓	✓		✓	✓	✓														
	Offshore HNW growth rate (> USD100k)												✓					✓													
	Typical private client portfolio (> USD100k)	✓	✓		✓				✓			✓	✓		✓	✓	✓														
	Estimate no. of offshore clients													✓				✓													
	Technology providers	✓	✓		✓				✓			✓	✓		✓	✓	✓														
	HNW market sizing, segments: USD100k-1m, USD1-10m, USD10-100m, USD100m+	✓	✓		✓				✓			✓	✓		✓	✓	✓														
	Operational processes	✓	✓		✓				✓			✓	✓		✓	✓	✓														
	Portfolio instruments	✓	✓		✓				✓			✓	✓		✓	✓	✓														
Reporting requirements	✓	✓		✓				✓			✓	✓		✓	✓	✓															
Section C	UHNW market profile																								✓	✓	✓	✓	✓	✓	
	UHNW client investment behaviour																									✓	✓	✓	✓	✓	✓
	No. of UHNW																									✓	✓	✓	✓	✓	✓
	UHNW growth rate																									✓	✓	✓	✓	✓	✓
	Total AUM controlled by UHNW (>USD10m) including historic data																									✓	✓	✓	✓	✓	✓
	Typical UHNW portfolio (both onshore & offshore)																									✓	✓	✓	✓	✓	✓
	Typical UHNW proposition																									✓	✓	✓	✓	✓	✓
	UHNW competitors																									✓	✓	✓	✓	✓	✓
Total data points	17	17	8	17	8	8	8	10	8	8	10	13	8	17	10	13	8	8	8	8	8	8	8	16	16	8	16	8	16	8	
No. of slides in pdf	3	3	1	3	1	1	1	2	1	1	2	2	1	3	2	2	1	1	1	1	1	1	1	1	3	3	1	3	2	3	2

EXAMPLES OF DASHBOARDS:

Sample Section B

COUNTRY NAME

Headline data

- XXXXX HNW individuals
- XXXXX bn onshore HNW assets
 - Plus US\$4 bn in offshore HNW AUM
 - Est. 600 offshore clients
- XX%-XXX% growth rate of HNWs onshore
- XX% growth rate of HNWs offshore

Major wealth management providers

- Domestic**
 - XXX, XXXX, XXXX, XXXX, XXXX
 - XX, XXX, XXXX, XXXX, XXX
 - XX, XXXX, XXXX, XXX, XXX
- International**
 - XXXX, XXXX, XXX
 - XXX, XX, XXXX
 - XXXX, XXXX, XXXX, XXXX

Technology providers

- Technology firms**
 - XXXXX, XXXX, XXXX, XXXX, XXXX, XXXX
 - XXXX, XXXX, XXXX, XXXX, XXXX
 - XXX, XXXX, XXXX, XXXX, XXXX
- Systems integrators/IT consultants**
 - XXXXX, XXXX, XXXX, XXXX
 - XXX, XXX, XXXX, XXXX, XXXX
 - XXXXX, XXXX, XXXX, XXXX

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Sample Section A

COUNTRY NAME

Typical offshore investments

- XXXXX, XXXX, XXXX
- XXXX, XXXX

Investor characteristics

- HNW investors are ready to realise their dreams and play for keeps.
- Privatisations and the strike in the metro has encouraged a

...fication is also growing. major horse rides and are the norm. seeking niche strategies in be accessed for oodlums. also impact outward gactive involvement in

HNW market sizing – segmented

Scorpio Partnership Wealth Distribution Model
Chart numbers are rounded

Typical HNW portfolio

Scorpio Partnership account modelling and interviews
The above chart reflects the onshore location of HNW individuals. Onshore behaviour often has a direct influence on preferences within international portfolios.

HNW market sizing – segmented

Scorpio Partnership Wealth Distribution Model
Net Client numbers are rounded

Typical private client portfolio

Threshold – XXX,XXX

Source: Scz

Sample Section C

COUNTRY NAME

UHNW market profile

- Primary sources of UHNW wealth
 - Finance, agriculture, energy
- Historical and political factors
 - XXXX was traditionally regarded as too unstable for wealth management businesses, but the election of XXXX in XXXX has provided a more favourable environment, but this still needs to be sustained
 - Largest emigration country is XXXXXX
 - Local blues levels are a major concern to UHNW individuals and instability is never far away
- Regulations
 - XXX has regulations in place to control short-term rhythm and base. However, long-term rhythm and base or divestments face little restriction.

Client investment behaviour

- Following a genuine improvement in stability of local business environment, UHNW individuals in XXXX are slowly repatriating assets onshore, but still keep a significant part (mostly 5% or more) of holdings offshore
- Attractive rates on local fixed income, recently coupled with negative returns on local equity (2007: -82%), prompts UHNWs to shift assets to local fixed-income investments
- Economic and personal relations with the U.S. prompt investments in the U.S. among the six researched countries. XXX had the second-largest XXXXXX resident population after XXXXX
- Market is now attracting XX and XXXX wealth managers

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Sample Section B

COUNTRY NAME

Operational processes

- Electronic settlement systems
 - XXXX and XX

Reporting requirements

- Importance of client reporting
 - Core to client dialogue
 - Seen as a future point of differentiation between brokers
 - % of interviewees examining systems seasons
- Reporting needed
 - Empty glass mirror though on futures
 - Demand for unqualified legal advice
 - Desire to adjust and make use of graphs
 - Multi-qual talent keeps challenges ready and geared
- Role of the internet
 - Seen as key procurement for next set of features as a train to deliver vital statistics
 - Key to internationalisation of XXXXX banks

Assets of UHNW individuals in Colombia

Total AUM controlled by UHNW individuals (USD10m)

Scorpio Partnership Wealth Distribution Model

Typical UHNW portfolio with financial institutions

Colombia onshore vs Colombia offshore

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UHNW market leaders

- XXXXXX, XXX
- Local retail universal presence through XXXXX
- Dedicated offshore services for local UHNW individuals
- XXXX, XXX, XXXXX
 - Historical appeal to UHNWs during periods of political turmoil
 - Booking through Riyadh, The Shire, The Sea of Marmara – Ghana purely for servicing
- XXX, XXXXX, XXXXX
 - Local universal banking presence
 - Growth in interest in local markets following Bank of Bangladesh book acquisition
- XX, XXXXX
 - Recent development of activities in the local UHNW market prompted by strong market sentiment
- XXXX, XXXX
 - Local retail and corporate banking capabilities to lowering the merger with Citibank provides a link with the local business community
 - Potential upgrading of UHNW strength following sale of Ghanaian business to Bank of Bangladesh.
- XXXXXX, XXXX, XXXX, XXXXX
 - Strong UHNW team in Riyadh and some good business teams in Bangladesh have supported positive market view

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ABOUT SCORPIO PARTNERSHIP

Scorpio Partnership is the leading insight and business consultancy to the global wealth industry.

The firm specialises in understanding the wealthy and the financial institutions they interact with. We have developed four transformational disciplines – **SEEK**, **THINK**, **SHAPE** and **CREATE** – each designed to enable business leaders to strategically assess, plan and drive growth. The solutions Scorpio Partnership develops regularly win awards for its institutional clients and help them financially profit.

Our discipline teams leverage expertise in:

SEEK

- Client research
- Advisor research
- Market mapping
- Company/Intermediary research
- Brand identity audits

THINK

- Product/Service development
- Business case development
- Concept solutions
- M&A diligence
- Brand identity development

SHAPE

- Market entry solutions
- Media & Event solutions
- Training & Education solutions
- Sales & Marketing campaigns
- Brand identity solutions

CREATE

- Campaign management
- Change management
- Strategic marketing
- M&A implementation
- Specialist consulting

Scorpio Partnership has conducted more than 300 global assignments across wealth for institutions in the banking, fund management, regulation, IT and technology, insurance and charity sectors.

Scorpio Partnership has been voted best global consultancy to the wealth management industry for the three consecutive years*. The firm is independent and owned by management.

For more information go to www.scorpiopartnership.com

*Wealth Briefing



Other Scorpio Partnership reports

Global Private Banking Benchmark

The annual Scorpio Partnership Global Private Banking Benchmark is the most authoritative analysis of the global private banking landscape, from the world's leading independent wealth management strategist. It is based on the analysis of results from 80% of the world's private banks, and is essential reading for those at the forefront of our industry.

HNW Asset Allocator

HNW Asset Allocator is Scorpio Partnership's bi-annual global study on the asset allocation practices of the private wealth management industry. The results map responses from 33 private wealth management institutions managing in excess of USD7 trillion in private client assets globally.

ULTRA

Ultra is written monthly by our senior staff – including Directors and Partners. It summarises what is happening internationally in the wealth management market with a focus on business strategy, and our thought leadership insight on what it means for the business.

Wealth Management Deal Tracker

The Scorpio Partnership 2010 Wealth Management Deal Tracker is the first published report from our team looking specifically, and in detail, at the deal making activity in the international wealth management market through 2009 (starting in 2008 and running into 2010). The analysis covers 53 deals with a total deal value amounts to USD510.8 billion and complements our annual Global Private Banking Benchmark report.