

AIMS

AIMS was created in 2015, to provide a fresh and transparent fee-based approach to financial services in the Asia region. The firm's growth strategy is to offer a professional and independent financial advisory and investment service proposition; as well as aligning client portfolios from similarly minded firms.

AIMS is pleased to announce significant progress on two such projects. The clients of Charles Burchhardt have been successfully transitioned over to AIMS and those of Ambleside Consultants Limited are near completion. This has resulted in a significant increase in both client numbers and assets under management. This growth will benefit our clients as our independent fund managers and research teams view AIMS as a successful and growing business, giving us enhanced positioning with our business partners.

Charles remains a Consultant for AIMS and regular visitor to Asia.

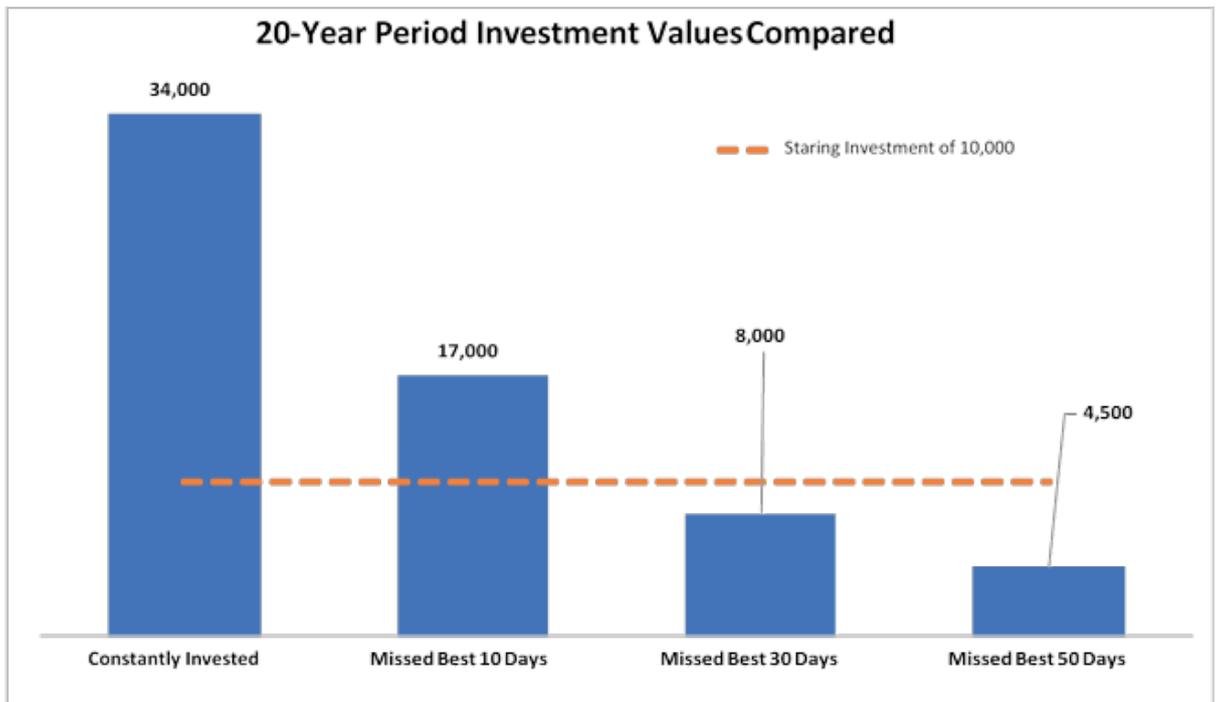
Markets

After a terrible time in late February and early March as markets reacted to the pandemic, we've seen a reduction in volatility. Positive portfolio returns for April have generally seen the year to date losses halved. This shows initially markets overreacted as they tend to under the circumstances and that the expected bounce has occurred to a degree. Focus on everyone's minds is the pandemic and markets still ebb and flow on good and bad news, both regarding the virus and the extent of the economic effects. We expect this to continue on the road to recovery. With the UK beginning to open up, markets are looking for good news on the back of it.

Keeping cool

What does making the wrong decision look like for Investors?

A disproportionate amount of investment returns to equity investors come from having exposure to a small number of very positive trading days in equity markets. Let us say that again because it's extremely important. Over a long-term time-horizon, missing just a few of the highest return days in equity markets can have a dramatic negative effect on investor portfolio returns.



Source: JP Morgan Asset
Management, Holden Partners

As financial planners, we are providing lifetime advice and so short-term fluctuations are only important as you near your goals. We recommend regulated discretionary investment managers with long-term returns as goals using multiple assets classes to spread risk. They work independently from us, managing client money using independent research and compliance. They are generally looking to invest in funds who prioritise companies with strong balance sheets and low debt levels that will give long-term performance. All clients have direct access to our fund managers representatives as required.

Thailand

With comparatively low numbers, Thailand is experiencing gradual relaxation of restrictions throughout May with steps laid out for normalisation. We will certainly see a new normal but with healthcare coping well we are moving in the right direction to minimise economic distress. Looks like working from home will be the 'norm' for a while, but there are so many ways to stay in contact these days we are happy to keep in touch in ways that work for you. For the best levels of security whilst sharing personal information, we prefer Microsoft Team or WhatsApp as they have good encryption levels, rather than the likes of Zoom and Skype.

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Pensions and
Investments



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