
BEQUEST
We Build Your Legacy

About Bequest

With a deep understanding of financial international markets, Bequest brings together a team of professionals to navigate the complex world of dynamic markets.

We offer bespoke Wealth Management, Family Offices, and Corporate Advisory services based out of the DIFC, Dubai. Our aim is to provide innovative, customised strategies to meet your specific financial requirements. We also provide ongoing insights into the global and green economy, helping you understand market dynamics and make well-informed decisions.

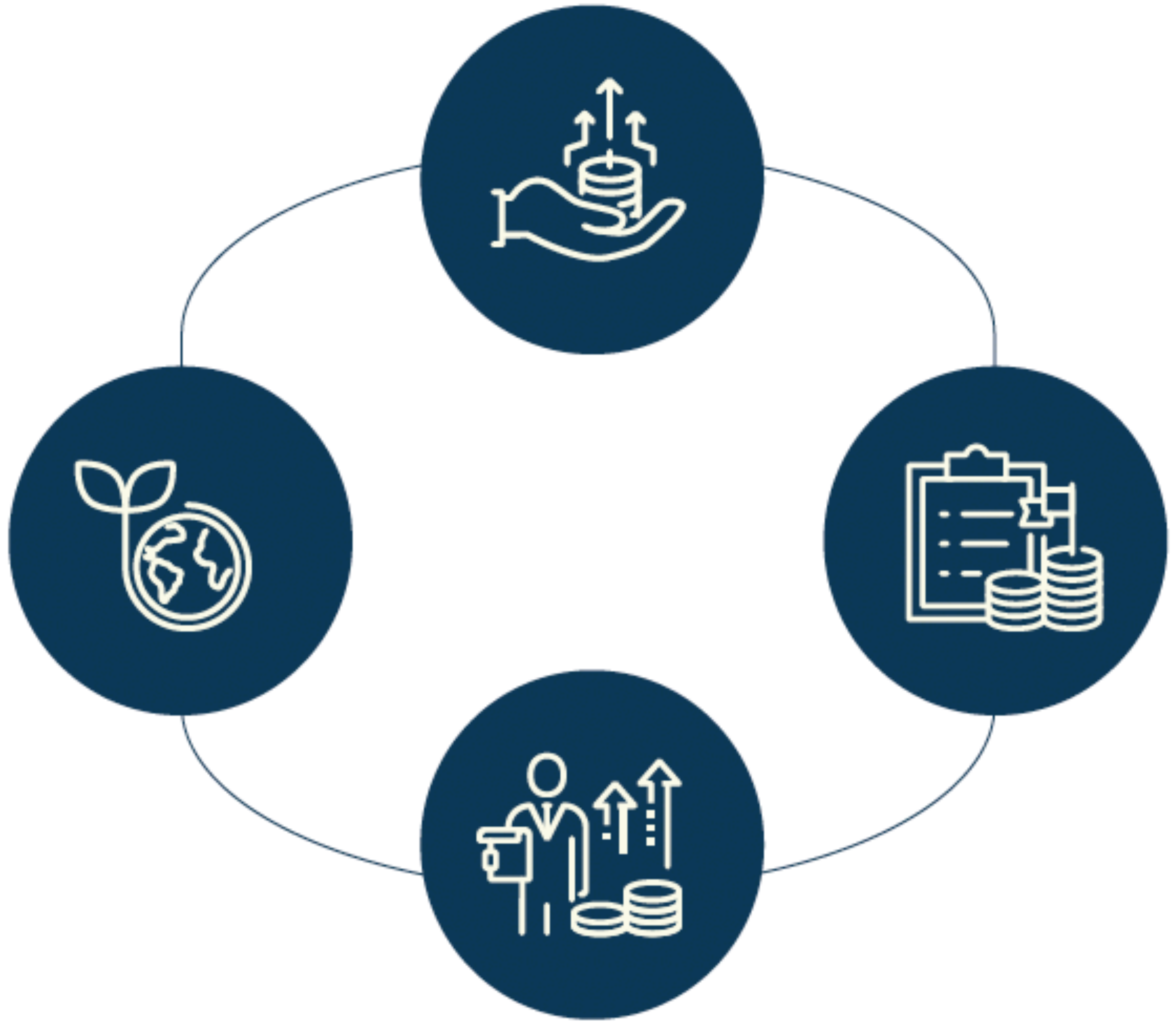
Our Values

At our core, **trust and integrity** guide us in nurturing your complete financial future, leaving a lasting impact of your legacy.

We highly value **expertise** for navigating complex financial scenarios, investments, and taxation. We're committed to relentless learning and application to better manage your finances.

Fiduciary duty is essential for trust and best long-term financial results, so we act in your best interests, even when the outcomes are uncertain.

Investing Strategies



Yield Focused – Investing in assets which have income orientation and potential to contribute regular income for liquidity support

Sustainable Investing – Seeking to invest in areas that do not have a depleting action on nature and resources but impacts the environment positively.

Global Strategic Asset Allocation – It entails understanding client's overall asset liabilities consideration, presence of various hard and financial assets – financial and life cycle planned liabilities, cash flows and other important obligations.

Equity Model Portfolio – Creating a carefully balanced collection of securities (taking into account meet basis analysis and suitability) to give you optimal returns over time.

Ultra High Net Worth Individuals/Institutional – Taking in account of volatility level, time horizon, and risk tolerance.

Investment Product Suite

Equity

A. Mutual Funds & ETFs: - A mutual fund pools money from multiple investors to invest in a diversified portfolio of stocks, bonds, or other assets, while an ETF (exchange-traded fund) is a type of investment fund traded on stock exchanges, mirroring the performance of a specific index or asset class.

B. Portfolio Management Services - It encompasses the active management of an individual's or institution's investment portfolio through tactical asset allocation, security selection, and risk management strategies to optimise returns and manage risk in accordance with the client's investment objectives and constraints.

Debt

A. Passively Managed Strategies - Accumulate and maintain strategies until maturity.

B. Actively Managed Strategies - Short Term Funds, Dynamic / Duration Funds, High Yield Strategies

Alternates

A. Venture Debt

B. Private Equity / Venture Capital

C. Gold ETFs

D. Real Estate - Organised real estate deals typically involve homes and apartments. Rental income funds typically include commercial and office buildings. Real Estate Investment Trusts (REITs).

E. Pre-IPO + IPO Opportunities

Family Offices

Inheritance safeguards your family's distinctive legacy, ensuring long-term prosperity and happiness.

We carefully consider your unique lifestyle, real estate holdings, private and public investments, business operations, and plans for passing these down to future generations by coaching the family to make joint decisions effectively after gaining a large inheritance.

We also believe in the importance of giving back to society and the environment through charitable contributions and philanthropic efforts.

Contact Us

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