
BEQUEST
We Build Your Legacy

About Bequest

Based in the DIFC, Dubai, we provide tailored Wealth Management, Family Offices, and Corporate Advisory services. Our goal is to deliver innovative, customised solutions that address your unique financial needs.

Additionally, we offer ongoing insights into global market dynamics, empowering you to make informed decisions. Our operations are regulated by the Dubai Financial Services Authority (DFSA) and the Financial Services Commission (FSC), ensuring the highest standards of integrity and compliance.

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.

Our Services

Private Banking

Investment Advisory

Multi Custody

Wealth Planning

Arranging Credit

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

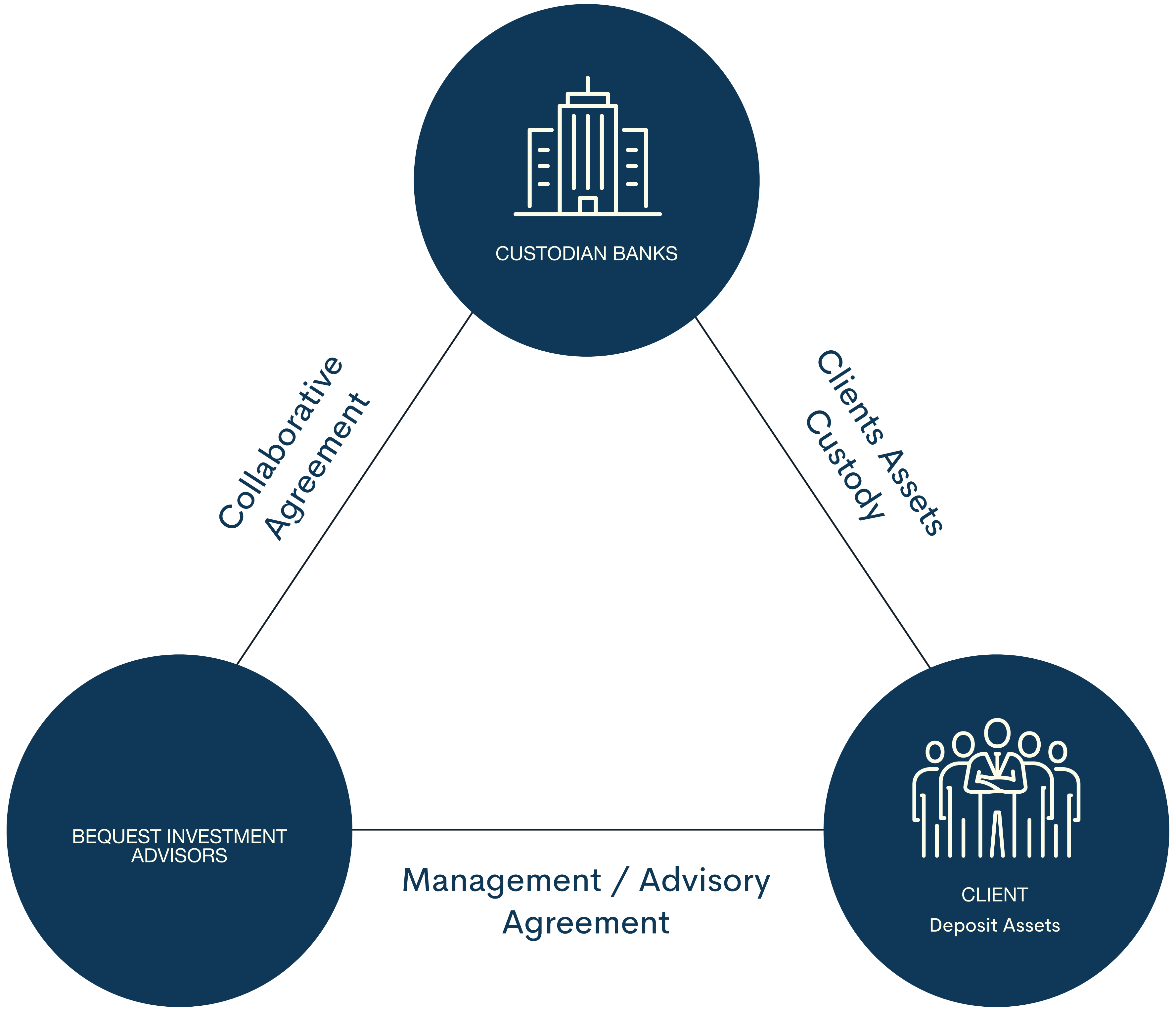
B. Private Equity / Venture Capital

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

Multi-Family Offices



Our goal is to collaborate with you through a dedicated team of experts, aligning your family projects with your investments.

As a boutique investment advisory firm, we cultivate strong partnerships with top specialists, both internally and externally, embracing an open architecture approach. This allows us to connect you with the best experts, tailored to your unique needs.

Bequest Advantages

- **Custodial Independence:** Manage assets without transferring them
- **Multi-Bank Aggregation:** Single-point oversight across multiple banks
- **Open Architecture:** Best-in-class solutions from various providers
- **Conflict Mitigation:** No sales-driven product pushing
- **Relationship Stability:** Lower advisor turnover

Our Offices

Addresses

Dubai

Bequest Capital (DIFC) Limited
Regulated by the DFSA

DIFC Fund Centre, Unit GD-PB-04-01-OF-01-0, Level 1, Gate District Precinct Building 4, Dubai International Financial Centre,
PO Box 121208
Dubai
UAE

Mauritius

Bequest Capital Limited
Regulated by the FSC

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Credentials

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