ARECA CAPITAL

CORPORATE BROCHURE

Hello, we are Areca Capital

Areca Capital is a private wealth management company focusing on fund management and wealth advisory. We are licensed and registered with the Securities Commission Malaysia and the Federation of Investment Managers Malaysia.

Since our inception in 2006, we have built a reputation as an innovative and high-performing fund manager, winning new clients with our performance track record and exceptional client service qualities.

Our services encompass a broad wealth management spectrum – from wealth protection to distribution. We pride ourselves on our professional yet friendly approach.

Areca Capital seeks to provide our clients with cost-effective wealth management services and consistent risk-adjusted returns over the long term. Our clients range from individuals to corporates, family and private trusts, foundations and other institutions.

Our Vision

Your trusted partner in wealth management journey.

We hope to create true wealth and endless possibilities for a lifetime as well as for generations to come, ultimately preserving your legacy and name.

Our Mission

- To be the wealth management partner through generations.
- To be the region's leading and innovative wealth management solutions provider.
- To be employer of choice.
- To exceed expectations of stakeholders.
- To contribute towards the betterment of the financial industry.

Our Core Values

- Trustworthy, Ethical and Integrity
- Client-focused
- Friendly
- Teampower

Meet our Board of Directors & Investment Committee

Raja Datuk Zaharaton binti Raja Dato' Zainal Abidin

Chairperson, Independent Director, Independent Investment Committee Member

She has served the Government of Malaysia in various capacities in the economic sphere for 36 years. Her last post was as Director General of the Economic Planning Unit at the Prime Minister's Department.

She holds directorships in public companies such as Taliworks Corporation Bhd and Yinson Holdings Bhd.

Dr. Junid Saham

Independent Director, Independent Investment Committee Member

He has a total of more than 45 years of work experience in audit, banking, corporate finance and investment management.

He was Investment Manager at Bank Rakyat and General Manager at AMMB (now Am-Investment Bank).

He then was an independent director in several public listed companies. He graduated with a Ph.D. (Economics) from The University of Hull, UK.

Dato' Seri Lee Kah Choon

Independent Investment Committee Member

He had served as board member of various federal & state government linked companies and corporations.

Currently, he is a board member of various listed & private companies.

Datuk Lim Hong Tat

Senior Advisor

With over 37 years of experience in many aspects of banking, he held senior management positions such as Director/President and CEO of Maybank Philippines Incorporated, Head of International Banking, Head of Consumer Banking, CEO/Country Head of Maybank Singapore and most recently as Group CEO, Community Financial Services, Maybank.

Danny Wong Teck Meng

Non-Independent Executive Director, Chief Executive Officer

He has more than 30 years of work experience in stock broking, fund management, unit trust business and financial planning field. Danny is a member of Financial Planning Association of Malaysia, CFP CERT TM.

He holds a Capital Markets and Services Representative's License for the regulated activities of Fund Management, Financial Planning and Investment Advice from the Securities Commission Malaysia.

He is an elected Director of the Federation of Investment Managers Malaysia (FIMM). He also holds directorship in other private equity and startup companies.

Edward Iskandar Toh

Non-Independent Executive Director, Chief Investment Officer (Fixed Income)

He has over 30 years of experience in the fixed income markets in banking and fund management industries.

He holds a Capital Markets and Services Representative's License for the regulated activities of Fund Management and Financial Planning from the Securities Commission Malaysia.

He has a Bachelor of Business Studies Degree (Curtin University) and is a member of Financial Planning Association of Malaysia, CFP CERT TM.

Key Management Team

Danny Wong
Chief Executive Officer

Edward Iskandar Toh
Chief Investment Officer (Fixed Income)

Tan Hong Peng
Senior General Manager

Ch'ng Cheng Siew
Chief Investment Officer (Equity)

Kenny Tan
Chief Operating Officer

Ong Lei Hua
Internal Audit

Nor Juleeana Binti Badron
Fund Management

Wong Chaw Chern
CEO Office / Private Wealth

Thong Lai Kuan
Compliance

Adeline Yeo
IT - MIS

Chua Yeow Kuan
IT - System Development

Azmi Mohamad
Operations - Funds

Tan Lee Kiaw
Operations - Unit Trusts

Sabrina Ang
Private Wealth & Advisory Solutions

Adam Danial Nazaruddin
Private Trust

Darren Ong
Private Trust

Private Wealth Managers

and many more at your service

May Seow

Jackie Lee

Wong Chee Keong

Christine Loh

Chevonne Liew

Brian Lim

Tan Shi Ling

Teresa Chan

Jenson Chiang

Winnie Tan

Susan Ng

Yeo Sek Kiat

June Phua

Sabrina Lee

Achieving excellence and serving
our clients wholeheartedly with a team of
100 bright minds (and counting).

Our Private Wealth Services

Investment Management

Manage and potentially grow your wealth through investments with Areca Capital.

Financial Advisory

Our comprehensive advisory is tailored to your unique goals and legacies.

Private Trust

Ensure your wealth and legacy live on by your design with a personalised trust structure.

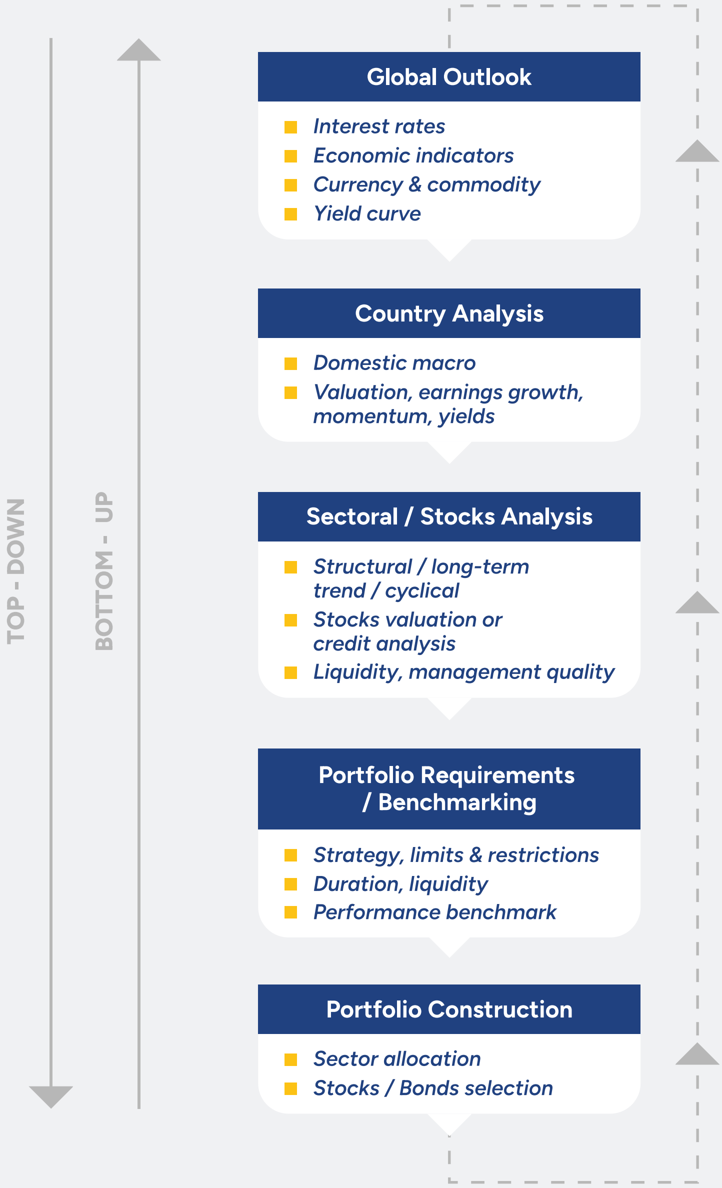
1. Investment Management

Our Investment Managers work towards growing your wealth through investments to optimise your risk-adjusted returns in the long term.

- Wholesale or Unit Trust Funds managed by Areca Capital or other Fund Managers
- PRIME/Private Mandates - Personalised Client Portfolios
- Portfolio Advisory

Our Investment Philosophy

Our investment philosophy revolves around the belief that prices of financial assets are driven by a combination of liquidity flows, risk appetite and ultimately, the intrinsic value of the underlying asset. The interplay between these factors in the short and long term provides us with the opportunity to maximise the risk-adjusted value. In today's market conditions, flexibility and versatility to changing factors are vital virtues.



Our Investment Strategy

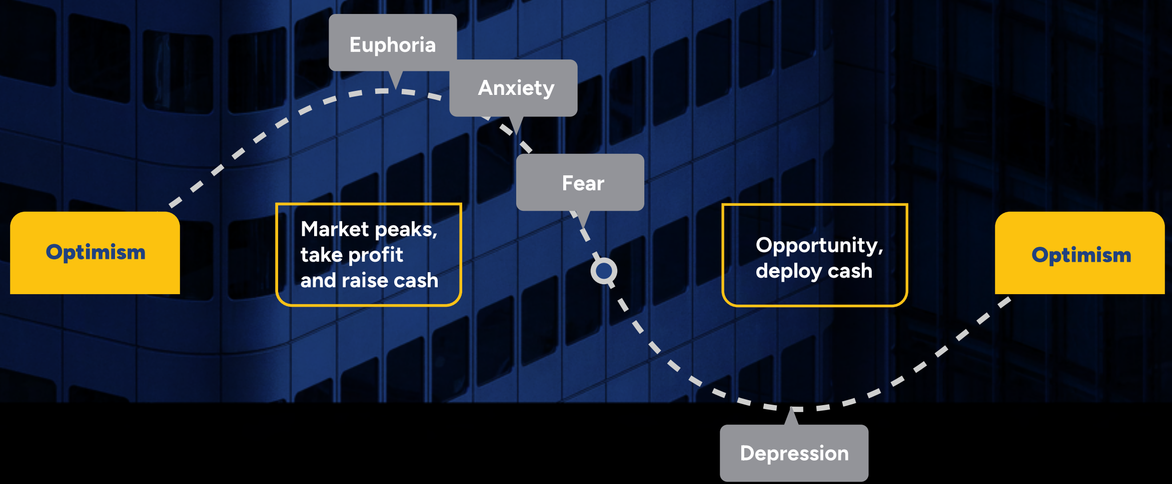
As your Investment Manager, we analyse broad macro-economic factors affecting global and local markets.

The Equity and Fixed Income investment team will then identify the structural trends before conducting in-depth stocks valuation and credit analysis on the individual stocks or bond issues.

Portfolios are constructed with consideration to specific objectives, liquidity, cash flow needs, etc.

Our Cash Allocation Strategy

Cash is an important asset class, not only for risk management but to take advantage of market conditions for potential opportunity.



2. Financial Advisory

Rather than purely looking at returns, we look at the bigger picture by implementing an advisory-based approach which is tailored according to your objective.

- Comprehensive planning for investments and retirement
- Tailored approach to your unique goals
- Collaboration with tax advisors, lawyers, and trust specialists

Strategy

By working closely with our advisors, investment portfolios will be constructed based on a strategic asset allocation which is in line with your goals, circumstances and risk appetite. We particularly help in:

- Investment Planning
- Retirement Planning
- Estate Planning

3. Private Trust

With proper estate planning, rest assured that your hard-earned wealth and legacy live on by your design to benefit the next generations as it can be based on the goals and circumstances you have set.

- Personalised guidance by licensed Corporate Trustees and Investment Manager
- Customised trust structure and conditions
- Aligned with your objectives and needs that support both yourself and your beneficiaries

Strategy

Professionally managed by Corporate Trustees and Investment Managers, you can create and customise your Private Trust by answering some considerations you may have. Here are some examples:

- What are the objectives of this Trust? (For family maintenance, medical expenses, emergency funding, charity, etc.)
- Who are the beneficiaries?
- How much, when and to whom should the trust asset distributed?
- How long should the Trust be?
- Who will take care of me and my loved ones should the unforeseen happens?
- Are there specific conditions for my beneficiaries to receive their entitlement?
- How do I plan for the sustainability of the trust?


Empowering the next
generation's legacy.

Sustainability

In line with our vision to achieve generational wealth for our clients, Areca Capital aims to progressively implement sustainability initiatives across the four pillars. Find out more on our sustainability journey and report at our company website's Sustainability section.

Economic	Environmental	Social	Governance

Contact Us

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Representative Offices

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- Melaka
- Johor Bahru
- Kota Kinabalu
- Kuching

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