

Halkin Investments LLP



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Halkin Investments LLP is a boutique Wealth Management firm established in 2010, which is Authorised and Regulated by the Financial Conduct Authority in the United Kingdom where our objective is to provide bespoke and holistic financial services to professional Ultra-high net-worth clientele across the globe. The core business of the firm is to provide independent investment management services to professional clients either in an Advisory or Discretionary capacity.

Halkin's experienced Investment team takes a proactive investment approach with a focus on

suitability to ensure the advice or decisions made on the client's behalf are appropriate, therefore offering a tailored first class client experience. We acknowledge each client has bespoke requirements, thus we devote considerable attention to understanding the client's financial objectives and risk profile and endeavor to reflect this in the active management of their portfolios. One facet of the investment management approach focuses on fixed income, which can provide credible and forward looking cash flows.

Founder

Mr. Syed Bashir Ahmad (commonly known as Bashir) is a seasoned banker with more than 25 years of experience in Financial Services. Bashir is married with 3 children and is a keen advocate and supporter of ensuring a sustainable future through charitable causes across the globe, namely in education and healthcare. Over the years, he has held multiple senior management positions with the likes of ABN AMRO, ING and Bank of Singapore in London. Bashir played an instrumental role in creating the Private Banking Division in both ING Bank and Bank of Singapore in London.

Bashir took on an entrepreneurial approach and founded Halkin Investments LLP in 2010. The approach was taken with a desire to provide holistic solutions and serve the clients best

interest in an environment where the banks were losing their competitive advantage. He firmly believes that the alignment of interests with clients is fundamental to forge a long term relationship. Bashir's pragmatic approach to serving clients originates from his ability to think like a Private Banker with the acute skill set of an Investment Banker.

Bashir has actively promoted diversity throughout his career in various organizations and continues to do so still to this day. He firmly believes that diversity in the workplace is crucial in creating an environment that promotes equal opportunities for all; unlocking innovation and enterprise in the firm. His ethos saw him receive an award as one of the top BMEA leaders in the UK in 2016 and now in 2019, he has been nominated to be a top 10 business leader in this category.

Holistic and value added Financial Services

Bashir believes the current banking infrastructure is infested with various conflicts of interest and therefore, lacks the ability to provide value added services to professional Ultra-high net-worth clientele. The solution does indeed exist but it requires an independent and professional firm to successfully conclude the transaction. Halkin is appropriately positioned for this as they are free from inherent conflicts faced by banking institutions.

Success

In the last decade Halkin has been successful in establishing and maintaining long-lasting relationships with professional Ultra-high net worth clients based on mutual trust and value creation. A typical client at Halkin is a professional client, with average Assets under Management in excess of 10 million USD. Our services are focused at Professional Ultra-high net worth clientele, we are able to allocate a significant amount of resources to each engagement to ensure that the client consistently receives a higher level of personal service.

Based on each client's individual requirements, a multitude of capital providers including banks, non-banks and private sources are used to create a solution most suitable to the client's needs. Halkin has been very successful in the monetization of client assets like Real Estate within London and Europe and movable assets such as Super Yachts. With a view to creating a self-sustainable structure where additional liquidity is created and utilised for the client's benefit. Such liquidity may be deployed in Halkin's fixed income programme with the view to generate a higher level of income which is sufficient to service the loan and the operational costs applicable to Super Yachts or assets alike, such as Private jets.

For Halkin the emerging markets including Middle East and Asia are of interest. These geographies have seen the emergence and development of very talented and entrepreneurial set of clients who are looking for asset diversification and professional investment management services for their assets outside their home country. To further support this, Halkin Investments Middle East was incorporated which is an Authorised and Regulated financial Services firm based in Dubai, DIFC. Halkin Investments LLP is also exploring opportunities in digital technology to attract a new generation of millennials who are hands on in managing their investments distinct from the traditional approach to Private Banking and Wealth Management.

Investments

On the investment side, the focus is to invest in fixed income type of investments with a time horizon of 3-5 years, though, the underlying investments that the portfolio holds tend to have liquidity ranging from daily, weekly and monthly. Halkin actively monitors the risk profile of a portfolio on an ongoing basis and will either advise or make appropriate decisions to keep this in line with the risk profile and target returns agreed with the client. Within the agreed investment strategy, the clients may apply a certain level of portfolio leveraging to further

diversify and provide more liquidity to invest. The diversification is more for risk management and as a diversification tool.

Future

The firm's Advisory Board is an important cornerstone to Halkin where we take wise counsel on growth initiatives, operations and business strategy. Moreover, the firm has an Investment Committee which incorporates both members of the firm's Investment team, compliance and independent members who provide guidance on asset allocation and market and industry specific trends. This level of governance will continue to complement Halkin's plans for the future.

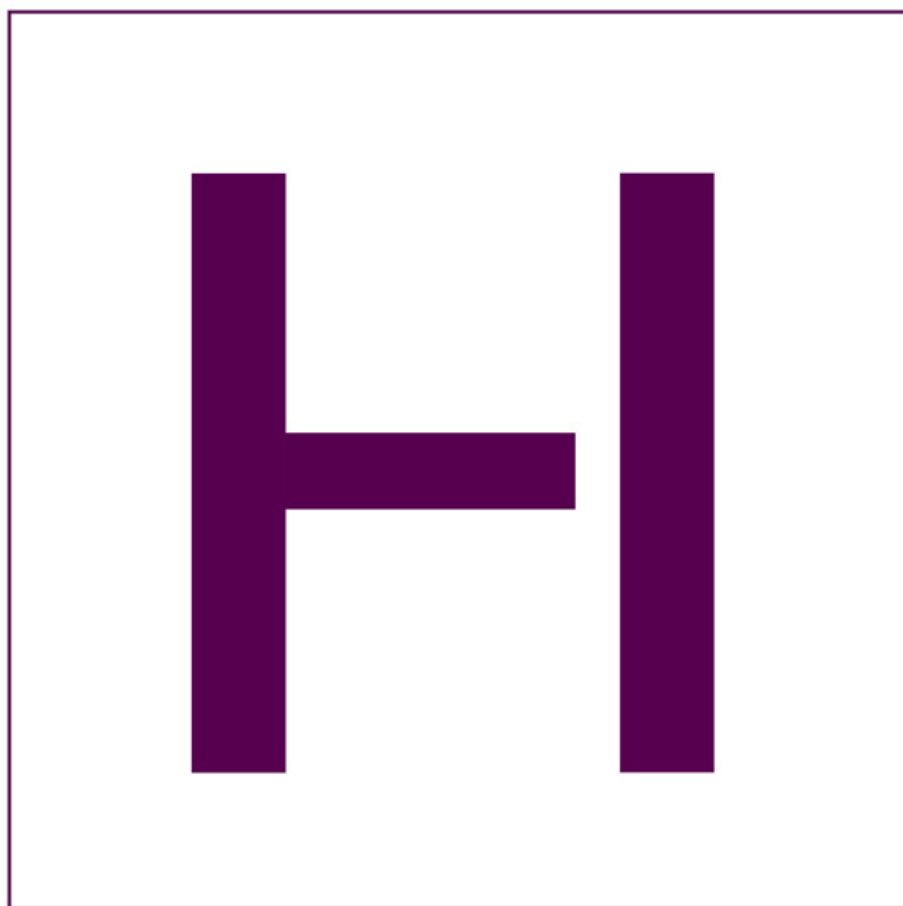
We believe Halkin and similar organizations are in a good space which is poised to grow in the near future. The traditional banking model has become obsolete and is prone to conflict of interest and lack of a proactive visionary mindset. Halkin applies a risk based approach to all instances, while we feel the pendulum has been moved to the extreme in banks and large financial institutions. Whereas the need of the hour is to provide appropriate solutions that manage the risk rather than avoid it completely.

The future for Halkin lies in a digital space by bringing best of breed robust systems to provide our clients with a well-engineered platform.

Halkin wants to embrace change ahead of the curve to deliver an all-encompassing investment management solution in line with existing and future trends. This is an element we strongly believe will differentiate us from our competitors going forward.

Important – This is not intended to be Investment Advice and shouldn't be understood as such.

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