

Corporate Profile

PROTECT TODAY, PROSPER TOMORROW.

2026



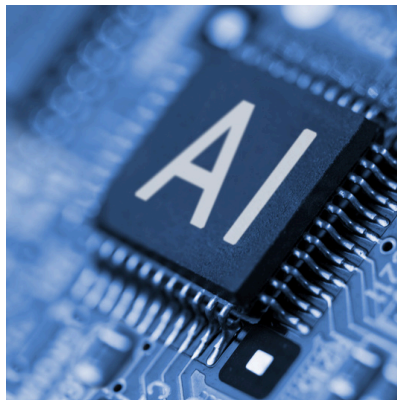
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PHILOSOPHY-
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Insights, Strategies and Success Stories

Protect Today. Prosper Tomorrow.

Premier Wealth Management Across Asia

Evolve Asia Limited is a client-focused wealth management firm dedicated to helping individuals, families, and businesses build, manage, and protect their wealth across Asia and beyond. Headquartered in Hong Kong since 2007.

19+

Years of Experience

2,400+

Global Clients

25+

Asset Classes

25+

Industry Partners

80+

Expert Consultants

WHO WE ARE

Heritage · Philosophy · Promise



Empowering Financial Growth Across Asia

Evolve Asia Limited is a premier wealth management firm serving over 2,400 clients — successful individuals, families, and businesses — across Asia and globally. We provide refined financial guidance, bespoke investment strategies, and discreet advisory services designed to preserve and grow your wealth. Founded in Hong Kong in 2007, our philosophy is simple: sophisticated advice, delivered with genuine care and clarity.

Decades of Trusted Expertise

Our team has navigated every major market cycle since 2007, providing guidance grounded in insight, stability, and long-term prudence.

Bespoke Strategies Grounded in Research

Every solution is tailored. Rigorous analysis combines with a deep understanding of your goals to design portfolios that reflect your personal ambitions.

Partnership for Generations

We believe wealth is about people, not just numbers. We partner alongside you and your family, building relationships that endure across generations.

Why 2,400+ Clients Choose Evolve Asia

Boutique, Client-First Advisory

Personalised, high-touch service where every decision centres on your goals, not product quotas.

Transparent Communication

Clear, jargon-free guidance with no hidden agendas — you always know exactly where you stand.

Research-Backed Investment Process

Strategies built on rigorous analysis, market intelligence, and disciplined risk management.

Tailor-Made Strategies

Every plan is designed specifically around your life, ambitions, risk profile, and legacy goals.

OUR SERVICES

Customised Solutions for Your Future, Family & Business



01

Estate Planning

Secure a lasting legacy for the people you cherish. We structure trusts, wills, and succession plans that protect assets across generations while minimising tax exposure.

02

Retirement Planning

Create a future of financial independence with a retirement plan tailored to your lifestyle. We model income streams, asset drawdowns, and longevity risk to ensure lasting security.

03

Charities & Foundation Management

We work with charitable organisations and foundations to protect and grow financial resources while honouring their philanthropic purpose and governance obligations.

04

Financial Restructuring

When circumstances change, we help reorganise and optimise your financial structure — from debt renegotiation to asset reallocation — identifying value others miss.

05

Strategic Financial Planning

A comprehensive plan covering investments, insurance, tax efficiency, and legacy — engineered around your goals and refined continuously as your life evolves.

06

Advisory & Co-Investment

Direct access to institutional-grade co-investment in Asian private equity, logistics real estate, private credit, and infrastructure — previously inaccessible to individuals.

INVESTMENT APPROACH

Disciplined · Research-Driven · Asia-Focused



Our Investment Philosophy

Sustainable wealth creation requires both discipline and adaptability. Our investment process combines top-down macro analysis with rigorous bottom-up research on individual securities, funds, and alternative assets. Every portfolio is stress-tested against multiple scenarios — including geopolitical disruption, currency dislocation, and liquidity shocks — before capital is committed. Our 2,400+ clients benefit from institutional-grade access and personalised attention that larger firms cannot replicate.

Asian Private Equity

Direct stakes in high-growth Asian businesses, GP co-investments and secondaries.

Private Credit

Senior-secured lending yielding 10–14% net in USD-denominated instruments.

Singapore & SEA REITs

Income real estate across logistics, data centres, and commercial assets.

Listed Equities

Long/short and long-only across Asia-Pacific with active currency management.

Insurance Wrappers

PPLI and VUL structures: tax efficiency, creditor protection, estate benefits.

Macro & FX Overlay

Currency hedging, rates positioning, and tactical strategies for volatility.

Risk Management Framework

Risk is managed at every level — portfolio, currency, liquidity, counterparty, and geopolitical. We employ multi-currency accounts to hedge volatility; use insurance wrappers to isolate assets from creditor risk; and maintain ongoing scenario analysis covering Taiwan Strait tensions, US-China tariff escalation, and global interest rate shifts. All 2,400+ clients receive real-time performance dashboards and quarterly deep-dive reviews.

2025 TRACK RECORD

Selected Client Outcomes · Funds · Equities · IPOs



Top 5 Performing Funds — 2025

Fund Name	Strategy	Client Entry	Exit / Status	Net Return
Asia Logistics RE Fund III	Private Equity RE	Jan 2025	Dec 2025	+34.2%
SEA Infrastructure PE Fund	Infrastructure PE	Feb 2025	Dec 2025	+28.7%
Pan-Asia Private Credit I	Senior Secured Debt	Mar 2025	Ongoing	+14.1% p.a.
Vietnam Manufacturing Fund	Growth Equity PE	Apr 2025	Ongoing	+22.5%
HK Tech & AI Growth Fund	Long/Short Equity	Jan 2025	Nov 2025	+41.3%

Top 5 Listed Equities — Buy-to-Sell Performance (2025)

Company (Ticker)	Exchange	Buy Price	Sell Price	Trade Period	Return
Alibaba Group (9988.HK)	HKEX	HK\$72.50	HK\$109.80	Jan → Aug 2025	+51.4%
Meituan (3690.HK)	HKEX	HK\$118.00	HK\$167.40	Feb → Sep 2025	+41.9%
TSMC (2330.TW)	TWSE	NT\$820	NT\$1,150	Mar → Oct 2025	+40.2%
Sea Limited (SE)	NYSE	US\$51.20	US\$74.60	Jan → Jul 2025	+45.7%
Grab Holdings (GRAB)	NASDAQ	US\$3.85	US\$6.20	Apr → Dec 2025	+61.0%

Top 5 IPO Participations — Allocation to Exit (2025)

Company	Market	IPO Price	Client Onboard	Exit Price & Date	Return
DeepSeek AI (HK IPO)	HKEX	HK\$28.00	Jan 15, 2025	HK\$52.40 (Jun 25)	+87.1%
Vinfast Motors (VFS)	NASDAQ	US\$12.50	Feb 3, 2025	US\$19.80 (Sep 25)	+58.4%
Coupang Logistics (CPL)	NYSE	US\$18.00	Mar 10, 2025	US\$26.30 (Oct 25)	+46.1%
GoTo Financial (GOTO)	IDX	IDR 338	Apr 22, 2025	IDR 510 (Dec 25)	+50.9%
NIO Battery (9866.HK)	HKEX	HK\$15.80	May 5, 2025	HK\$24.60 (Dec 25)	+55.7%

* Past performance is indicative only and does not guarantee future results. Returns shown are illustrative of client-level outcomes, net of fees.

2025 PERFORMANCE TIMELINE

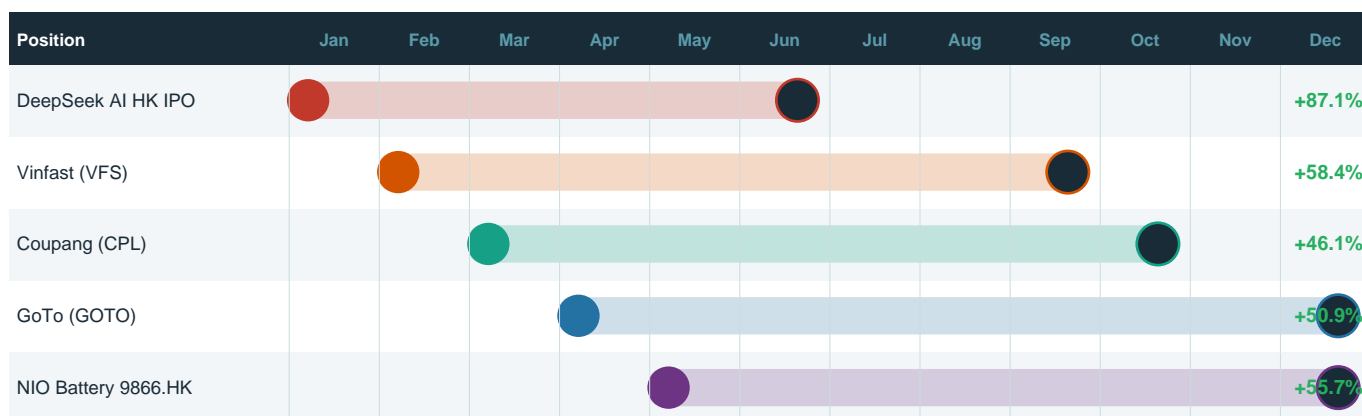
When Clients Came Onboard and Exited — Visual Trade Map



Listed Equity Trade Timeline — 2025



IPO Participation Timeline — 2025



● Filled circle = Client ENTRY date

■ Outlined circle = Client EXIT / sale date

Shaded bar = Holding period

* Illustrative of client-level outcomes. Past performance does not guarantee future results. All figures net of fees.

CLIENT VOICES

Trusted by 2,400+ Clients Across Asia and Beyond



Evolve Asia grew my capital 3x and protected my downside during COVID by hedging currency risks my previous Swiss bank never tracked. They actually manage wealth, not just store it.

Hans F.

Industrial Machinery Exporter

Since moving to Evolve in 2021, they have grown my private equity allocation by 22% annually using insurance wrappers. For the first time, my husband and I sleep through market crashes.

Madam Li Wei

Real Estate Investor

They introduced a disciplined private equity ladder I could never access alone, and helped me protect my exit proceeds in senior-secured private credit earning 11% fixed.

Mr. Vikram N.

SaaS Founder

Evolve Asia grew my passive income by 300% and protected my principal during the 2024 yen flash crash with multi-currency accounts. My Japanese advisor never mentioned currency hedging.

Mr. Kenji T.

Retired Banker

They helped me exit onshore China positions six months before the property crash — protecting my wealth with local knowledge and nuance that scared my European advisors away.

Dr. Zhao L.

Medical Device Founder

Evolve gives us real-time dashboards and GP stakes in tier-1 PE funds we couldn't access before. No other firm has the 17-year Hong Kong track record to back that up.

Al Maktoum Family Office

Representative



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Our Services

- › Estate Planning
- › Retirement Planning
- › Charities & Foundation Mgmt
- › Financial Restructuring
- › Strategic Financial Planning
- › Advisory & Co-Investment

Protect Today.

Prosper Tomorrow.

Disciplined Growth for Every Stage of Life

Headquartered in Hong Kong since 2007



Past performance is indicative only. Wealth management products involve risk.
This document is for information purposes only and does not constitute investment advice.