



AIA Hong Kong

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Media Release

AIA Hong Kong Launches the Insurance Industry's First Robotic Investment Choice Service in Hong Kong; Helps Customers of New ILAS Policies Build their Investment Portfolios with Ease

Hong Kong, 6 May, 2020 - Guided by its “customer-centric” philosophy, AIA Hong Kong is leading the insurance industry by launching Hong Kong’s first Robotic Investment Choice Service, which helps customers purchasing new Investment-linked Assurance Schemes (ILAS) build their investment portfolios according to individual risk tolerance levels and investment preferences. With the newly launched service, AIA Hong Kong integrates professional analysis and expertise from AIA Investment Management HK Limited (AIMHK) to provide personalised reference portfolios for customers based on their needs.

AIA Hong Kong will implement the first phase of the brand new Robotic Investment Choice Service in Hong Kong in mid-May, through the interactive Point of Sale (iPoS) platform for financial planners. Customers purchasing selected new ILAS¹ policies will undergo a financial needs analysis and risk profile assessment. Based upon the result of the risk profile assessment, AIA Hong Kong’s Robotic Investment Choice Service will then provide tailor-made reference portfolios to customers, helping them with their first investment choices under their new ILAS policies. This service will provide more than 120 reference portfolios for various products and risk assessment results, and will make quarterly adjustments based on AIMHK’s comprehensive market analysis in order to fulfill the investment needs of ILAS customers with varying risk tolerance levels. Moreover, if a customer is interested in a particular market or asset class under ILAS investment options, the Robotic Investment Choice Service can also provide a Best-In-Class Fund out of all the investment options in the relevant category for reference.

In the second phase, AIA Hong Kong will extend the Robotic Investment Choice Service to various electronic service platforms, giving customers of selected ILAS greater control and ease in building quality investment portfolios under their insurance policies.

The above-mentioned reference portfolios are compiled specifically for AIA Hong Kong after in-depth data analysis and thorough fundamental research by the professional investment teams at AIMHK, an asset management company under AIA Group Limited. With a mission of optimising investment performance, AIMHK brings professional investment services to customers with its profound understanding of the Asian financial market, extensive experience in global asset allocation and excellent data analysis practices.

¹ Only applicable to Treasure Advantage 2, Treasure Master Plus & U-Select
“AIA Hong Kong” or “the Company” herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

Mr. Leo Cheung, Chief Wealth Management Officer of AIA Hong Kong & Macau, said, "There are many investment options under ILAS, covering various geographical areas and asset classes. We understand that some of our customers may find it difficult to comprehensively and systematically select investment options that suit their individual investment needs. In adhering to our 'customer-centric' philosophy, AIA Hong Kong is combining our edge in fin-tech with AIMHK's investment expertise to launch the first Robotic Investment Choice Service in Hong Kong's insurance industry for ILAS products. Through an interactive and flexible platform, the service will enable our ILAS customers to build quality personalised investment portfolios under their insurance policies easily, delivering our brand promise of helping people live Healthier, Longer, Better Lives."

Mr. Cheung continued, "Everybody has a different risk tolerance level. Through our pioneer Robotic Investment Choice Service in insurance industry, we can fully cater to diverse investment needs of customers in ILAS products. Even for customers whose risk assessment scores differ merely by one point, we can still provide different, highly personalised reference portfolios to help them select their investment choices. For customers who are interested in an investment option of a particular asset class or investment market under ILAS, this brand new service can also offer Best-In-Class Fund for reference, helping customers build long-term investment portfolios that suit their needs."

About AIA Hong Kong and AIA Macau

AIA Hong Kong and AIA Macau are subsidiaries of AIA Group Limited. AIA Group Limited established its operations in Hong Kong in 1931. To date, we have over 18,700 AIA financial planners¹, as well as an extensive network of brokerage and bancassurance partners. We serve over 3 million customers², offering them a wide selection of professional services and products ranging from individual life, group life, accident, medical and health, mandatory provident fund, personal lines insurance to investment-linked products with numerous investment options. We are also dedicated to providing superb product solutions to meet the financial needs of high net worth customers.

¹ as at December 2019

² AIA Hong Kong internal data includes Hong Kong and Macau's individual life, group insurance and mandatory provident fund customers (as at 31 March 2020)

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