



**AIA Hong Kong**

AIA Hong Kong Tower,  
734 King's Road,  
Quarry Bay, Hong Kong  
T: (852) 2881 3333

AIA.COM.HK

## Media Release

### **AIA Hong Kong Extends Insurance Industry's First Robotic Investment Choice Service to e-Service Platforms for Customers; Supports New and Existing ILAS Customers to Build Their Own Investment Portfolios with Ease and Control**

**Hong Kong, 21 October, 2020** – Committed to integrating FinTech into its wealth management services, AIA Hong Kong rolled out Hong Kong insurance industry's first "Robotic Investment Choice Service" in May to facilitate financial planners to serve new customers<sup>1</sup> of selected Investment-linked Assurance Schemes (ILAS). AIA Hong Kong is now extending this service to e-service platforms for existing customers<sup>2</sup>. After completing a risk profile assessment, all customers of selected ILAS policies can now view personalised<sup>3</sup> reference portfolios via e-service platforms, such as the "AIA Connect" mobile app or web portal, enjoying the control of building quality investment portfolios at the ease of their fingertips.

With the help of AIA Hong Kong's "Robotic Investment Choice Service", after undergoing a financial needs analysis and risk assessment on the interactive Point of Sale (iPoS) platform for financial planners, new customers<sup>1</sup> can view personalised reference portfolios based on their risk assessment results, and take reference when making their first investment choices. Through the one-stop customer service mobile app "AIA Connect" or web portal, customers can continue to view updated reference portfolios each quarter, and adjust their existing investment portfolios under their ILAS policies accordingly. As for existing customers<sup>2</sup>, after updating their personal risk assessments, now they can also use the aforementioned e-service platforms to access reference portfolios to help them with their investment planning.

By extending the "Robotic Investment Choice Service" to customer service platforms, ILAS customers can enjoy the three key benefits:

1. **Personalised<sup>3</sup>**: Based on their risk assessment scores, customers can view their personalised reference portfolios that suit their individual investment preferences. Even for risk assessment scores that differ by as little as one point, matching reference portfolios will be different, which help customers to make investment choices that best fit their needs.

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<sup>1</sup> Customers who have confirmed to purchase new selected ILAS policies.

<sup>2</sup> Existing customers who have confirmed to purchase selected ILAS policies.

<sup>3</sup> This service makes available different reference portfolios based on different risk tolerance levels, for the reference and consideration of customers. AIA Hong Kong will not provide any investment advice to customers.

"AIA Hong Kong" or "the Company" herein refers to AIA International Limited (Incorporated in Bermuda with limited liability).

2. **Expertise:** The reference portfolios under this service are provided by AIA Investment Management Hong Kong Limited ("AIMHK"), an asset management company under AIA Group Limited. With thorough understanding of the Asian financial market and extensive experience in global asset allocation, AIMHK constructs more than 120 reference portfolios for this service and will make quarterly adjustments according to their analysis on financial market development.
3. **Hassle-free:** At the ease of their fingertips, customers can refer to personalised reference portfolios and build their own investment portfolios anytime, anywhere through the e-service platforms. If customers are interested in a particular asset class, the service will provide "Best-In-Class" investment options in each asset class for customers' reference.

In addition, "Robotic Investment Choice Service" has introduced a number of personalised features, including fund selector, quarterly reference portfolio alerts, investment selection price alerts and Chatbot, to fully enhance the experience of ILAS customers and help them manage their ILAS policies more effectively.

Ms. Bonnie Tse, General Manager, Strategy and Wealth Management of AIA Hong Kong & Macau, said: "Personalised investment service has been a privilege for high-end customers in the past. AIA Hong Kong's market-first 'Robotic Investment Choice Service' comes as a breakthrough, which combines AIMHK's professional investment expertise with the latest technology to enable ILAS customers<sup>4</sup> to access comprehensive and up-to-date reference portfolios. The service has been well-received since its launch earlier this year. Over 50% customers who have confirmed to purchase new ILAS policies have viewed the reference portfolios<sup>5</sup> available under this service. We are now extending this service to the more easily accessible e-platforms so that new and existing customers can update their investment portfolios any time, empowering them to grow their wealth at ease and helping them to live Healthier, Longer, Better Lives."

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<sup>4</sup> Customers who have confirmed to purchase selected ILAS policies.

<sup>5</sup> AIA internal survey data from financial planners (as of 31 August 2020).

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By extending the “Robotic Investment Choice Service” to customer service platforms, AIA Hong Kong is offering ILAS customers an opportunity to enjoy the three key benefits – Personalised, Expertise & Hassle-free, allowing them to manage their ILAS policies anytime, anywhere.

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### **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 planners<sup>1</sup>, as well as an extensive network of brokerage and bancassurance partners. We serve over 3 million customers<sup>2</sup>, 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.

<sup>1</sup> as at December 2019

<sup>2</sup> 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)

AIA Hong Kong  
Ms. Esther Chan  
+852 2100 1416

Bentley Communications Limited  
Mr. Ian Li  
+852 3960 1905