



CFA Society
Singapore

联合早报
LIANHE ZAobao



MoneySENSE
A National Financial Education Programme for Singapore



News Release

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SGX, CFA Society Singapore and MoneySENSE jointly launch the “Save and Invest Portfolio Series” with Lianhe Zaobao

Singapore Exchange (SGX) is partnering CFA Society Singapore and MoneySENSE to launch the year-long “Save and Invest Portfolio Series” with Chinese daily *Lianhe Zaobao*, in a move to encourage Chinese-language readers to save and invest for the future. This follows the success of *The Sunday Times* Invest section’s “Save and Invest Portfolio Series” that has been running for the past two years.

The monthly Save and Invest Portfolio Series named “步步为盈” will be featured in *Lianhe Zaobao*’s weekly financial planning column on every second Sunday of the month, starting from 8 October 2017. The series will feature simulated savings and investment portfolios of a young working adult, a married individual with a young child and a retiree - three Singaporean individuals each at different life stages.

The three simulated portfolios will be tracked over one year and will be guided by a panel of three CFA Society Singapore volunteers who are CFA charter holders. The objective is to show retail investors actual investment portfolios simulated based on the individuals’ investment goals and risk tolerance.

As part of this collaboration, [SGX Academy](#) and CFA Society Singapore will jointly organise quarterly “Save and Invest Portfolio Series” Mandarin seminars, expected to kick-off in early 2018. Retail investors will have the opportunity to interact with and have their questions addressed by SGX Academy trainers and CFA society professionals. Since the launch of the series in January 2016, SGX and CFA Society Singapore have jointly organised seven runs of the “Save and Invest Portfolio Construction Conference” which saw participation from 2,815 retail investors.

Lynn Gaspar, Senior Vice President for Client Development & Relationships at SGX, said, “We are excited to bring the well-followed Save and Invest portfolio series to *Lianhe Zaobao* readers, as part of our efforts to build more investment education resources for the Mandarin-speaking community. Some of this Mandarin content will also be offered through webcasts and webinars, in line with SGX’s digital thrust to engage retail investors through online channels. Through this collaboration with our partners, we can share new investment insights and knowledge to a wider group of investors.”

Jan Richards, CFA, President of CFA Society Singapore, a member society of CFA Institute, said, “At CFA Singapore, we believe that one is never too young or too old to start investing. To help Singaporeans meet their financial goals wisely, our CFA volunteers partnered with SGX and MoneySENSE in 2016 to start the Save and Invest Portfolio Series in *The Sunday Times*. We are now delighted to be able to do this for *Zaobao* readers as well. The best features of this series are firstly, it introduces a disciplined way of investing; secondly, it uses an asset mix that is readily accessible to the man-on-the street; and thirdly, it’s catered to Singaporeans at different life stages. Whether you’ve just started working, are raising a family, or preparing to retire, the series showcases living

Singapore Exchange
2 Shenton Way
#02-02 SGX Centre 1
Singapore 068804
main: +65 6236 8888
[sgx.com](#)

examples that readers can relate to and learn from.”

Quek Lee Kiang, Business Editor of Lianhe Zaobao, said, “Lianhe Zaobao is pleased to work with SGX, CFA Society Singapore and MoneySENSE on this meaningful project for the Chinese-language readers. Through the simulated examples of basic investment and portfolio building techniques, our readers can have a better understanding of different investment strategies, in accordance with their financial goals and risk tolerance level.”

Wang Moo Kee, 63, a retiree who was featured in *The Sunday Times* series, will also be participating in the *Lianhe Zaobao* Save and Invest Portfolio Series. He said, “The portfolio series prompted me to diversify and look beyond just stocks. Headwinds in the global economy can cause investment portfolios to move in unexpected directions. Having a panel of experienced analysts on board gave us more confidence in executing portfolio rebalancing as and when needed, and I am glad that my portfolio recorded a net return of 16.35% since the portfolio series started in January 2016, higher than the prevailing bank interest rates and risk-free CPF interest rates.”

Lee Boon Ngiap, Chairman of the Financial Education Steering Committee and Assistant Managing Director, Capital Markets, Monetary Authority of Singapore, said, “MoneySENSE is pleased to continue this partnership with SGX and CFA Singapore to equip the investing public with knowledge on financial matters and empower them to make informed investment decisions. The Save and Invest Portfolio Series in Lianhe Zaobao will further strengthen our financial education and outreach initiatives to Chinese-language readers.”

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About CFA Society Singapore

Founded in 1987, CFA Society Singapore is the first CFA chapter to be formed outside of North America and one of the most active societies of the CFA Institute, the not-for-profit global association of investment professionals that sets the standard for professional excellence and credentials. CFA Society Singapore is the 8th largest society globally with more than 3,500 members and organises more than 130 events a year. The mission of CFA Society Singapore is to lead the investment profession by promoting the highest standards of ethics, education and professional excellence for the ultimate benefit of society. This is implemented by member volunteers through the following 8 committees: Advocacy, Asset Management, Candidate Programs, Career Development, Membership, Networking, Professional Development & University Outreach. It also provides both live and on-line preparation courses for the Chartered Financial Analyst exams and is also an accredited education provider for Institute of Banking and Finance, Singapore. For more information, please visit www.cfasingapore.org or email info@cfasingapore.org.

About Lianhe Zaobao

Lianhe Zaobao, the Chinese flagship newspaper published by Singapore Press Holdings, is the largest-circulating Chinese newspaper in Singapore. Widely recognised in Southeast Asia for its superior quality as a responsible, objective, fair and credible newspaper, it also enjoys a good reputation and considerable influence in the global Chinese communities. Its 200-strong editorial team, including correspondents based in major cities such as Beijing, Shanghai, Guangzhou, Chongqing, Hong Kong, Taipei and Tokyo, keeps Singaporeans informed of major developments in the region. Zaobao.com, the online edition of Zaobao, has grown rapidly in popularity since its launch in 1995. It now draws over 4 million daily page views and attracts a monthly readership of 10 million.

About MoneySENSE

MoneySENSE is the national financial education programme in Singapore, spearheaded by the Financial Education Steering Committee (FESC). The FESC is chaired by the Monetary Authority of Singapore and comprises representatives from several public sector agencies and government ministries.

Launched in 2003, MoneySENSE aims to enable consumers to become more self-reliant in their financial affairs. It

Singapore Exchange
2 Shenton Way
#02-02 SGX Centre 1
Singapore 068804
main: +65 6236 8888
sgx.com

does this by helping consumers acquire the knowledge and skills to manage their day-to-day finances, make prudent investments, plan for their longer-term needs and exercise their rights as consumers of financial services. This, in turn, serves the twin objectives of helping consumers to attain financial well-being and consumer protection. For more information on MoneySENSE, go to <http://www.moneysense.gov.sg/>.

About Singapore Exchange (SGX)

Singapore Exchange is Asia's leading and trusted market infrastructure, operating equity, fixed income and derivatives markets to the highest regulatory standards. As Asia's most international, multi-asset exchange, SGX provides listing, trading, clearing, settlement, depository and data services, with about 40% of listed companies and 90% of listed bonds originating outside of Singapore.

SGX is the world's most liquid offshore market for the benchmark equity indices of China, India, Japan and ASEAN and offers commodities and currency derivatives products. Headquartered in AAA-rated Singapore, SGX is globally recognised for its risk management and clearing capabilities. For more information, please visit www.sgx.com.

Media Contacts

CFA Society Singapore

Laurel Teo
Director
+65 6323 6679
laurel.teo@gmail.com

Francis Er
Executive Director
+65 6323 6679
francis.er@cfasingapore.org

SPH

Quek Suzane
Associate Business
Editor Lianhe Zaobao
Chinese Media Group
+65 6319 2270
queks@sph.com.sg

Francis Mah
Senior Manager
Corporate
Communications & CSR
+65 6319 1028
mahys@sph.com.sg

MAS

Denise Gan
Deputy Director
(Corporate
Communications)
+65 62299425
Denise_gan@mas.gov.sg

SGX

Ho Lily
Marketing &
Communications
+65 67136786
lily.ho@sgx.com

Singapore Exchange
2 Shenton Way
#02-02 SGX Centre 1
Singapore 068804
main: +65 6236 8888
sgx.com