Evolve asia

2026

Corporate Profile

PROTECT TODAY, PROSPER TOMORROW.

HERITAGE - PHILOSOPHY- PROMISE

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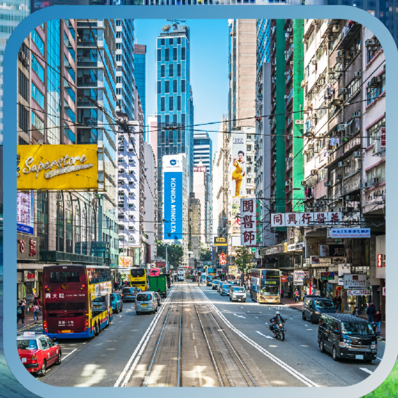

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Insights, Strategies and Success Stories

Who We Are

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.

Our Three Core Pillars

Pillar	Our Commitment
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

Advantage	What It Means for You
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 designed specifically around your life, ambitions, risk profile, and legacy goals.

Our Services

Customised solutions designed for your future, family, and business. Every service is tailored to your specific circumstances, goals, and legacy objectives.

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

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.

Asset Class Coverage

Asset Class	Description
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 planning 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 across funds, listed equities, and IPOs. All returns shown are net of fees and illustrative of client-level outcomes. Past performance does not guarantee future results.

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%

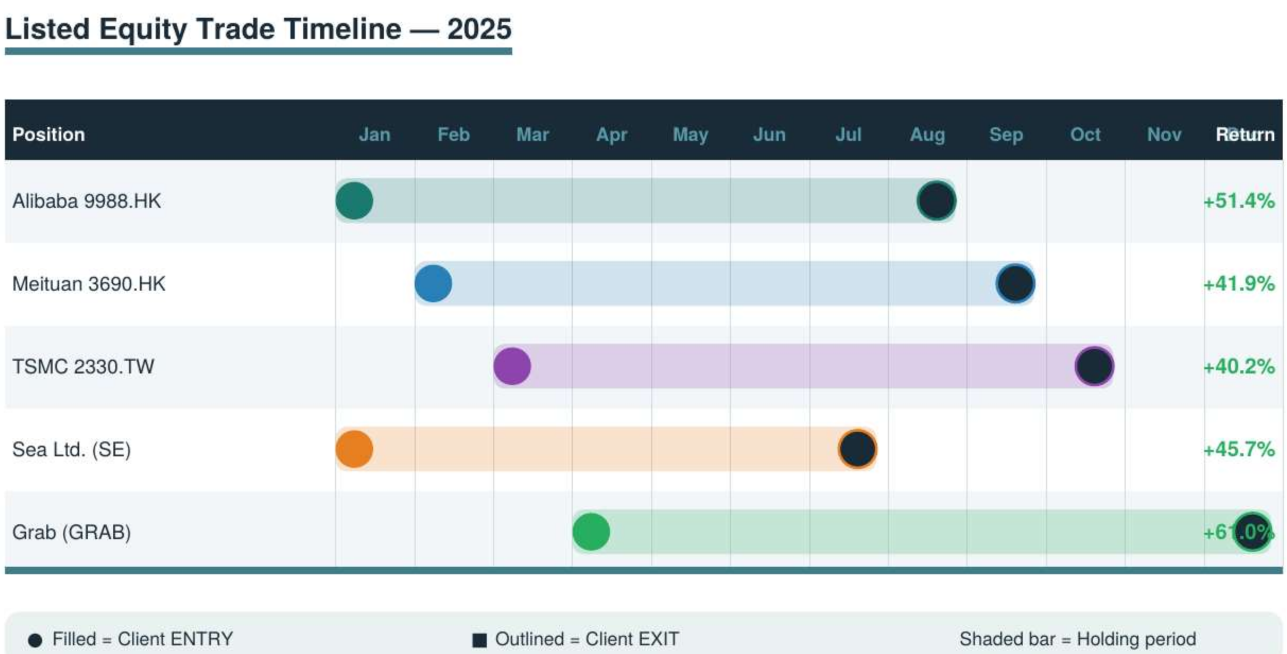
** Past performance is indicative only and does not guarantee future results. Returns are illustrative of client-level outcomes, net of fees.*

2025 Performance Timeline

Visual map of when clients came onboard and exited positions across listed equities and IPO participations during 2025.

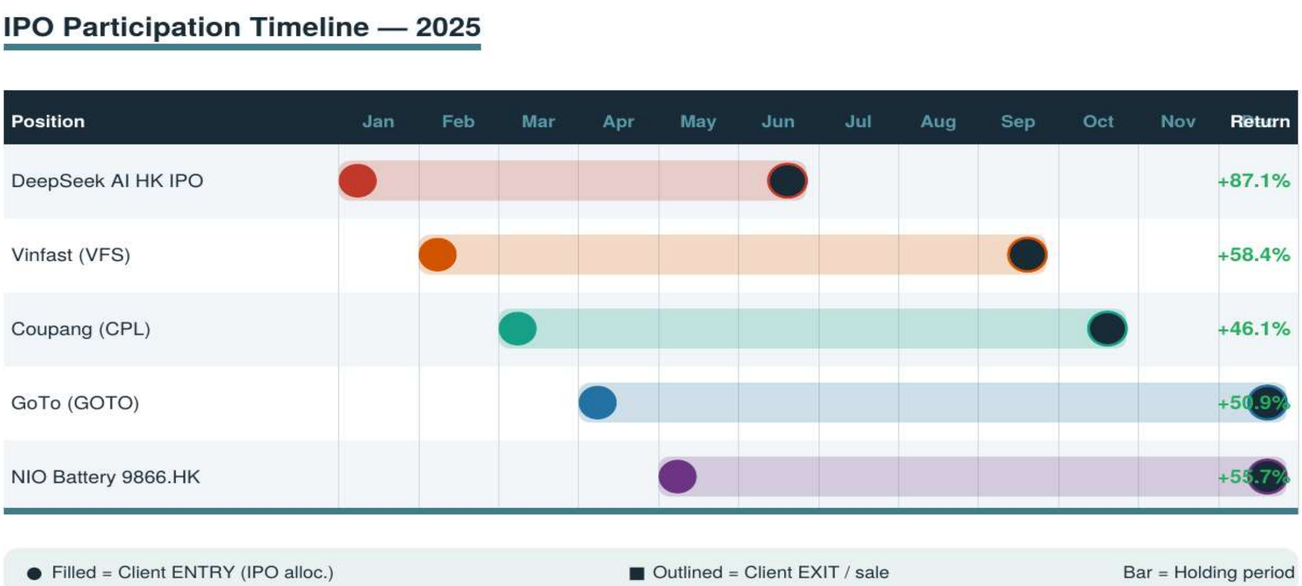
Listed Equity Trade Timeline — 2025

Position	Entry Month	Exit Month	Holding Period	Net Return
Alibaba 9988.HK	January 2025	August 2025	8 months	+51.4%
Meituan 3690.HK	February 2025	September 2025	7 months	+41.9%
TSMC 2330.TW	March 2025	October 2025	8 months	+40.2%
Sea Ltd. (SE)	January 2025	July 2025	7 months	+45.7%
Grab (GRAB)	April 2025	December 2025	9 months	+61.0%



IPO Participation Timeline — 2025

Position	Onboard Date	Exit Month	Holding Period	Net Return
DeepSeek AI HK IPO	January 15, 2025	June 2025	~6 months	+87.1%
Vinfast (VFS)	February 3, 2025	September 2025	~7 months	+58.4%
Coupang (CPL)	March 10, 2025	October 2025	~7 months	+46.1%
GoTo (GOTO)	April 22, 2025	December 2025	~8 months	+50.9%
NIO Battery 9866.HK	May 5, 2025	December 2025	~8 months	+55.7%



Client Voices

Trusted by 2,400+ clients across Asia and beyond. The following testimonials are drawn directly from client feedback.

> *"Evolve Asia grew my capital 3× 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 family sleeps 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 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 could not access before. No other firm has a 17-year Hong Kong track record to back that up."*
>
> **Al Maktoum Family Office** — Representative

Evolve asia

Protect Today. Prosper Tomorrow.

This document is prepared for existing and prospective clients of Evolve Asia Limited. It does not constitute financial advice or an offer to purchase any security. Please consult our financial adviser before making investment decisions.

Our Services

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

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