

**EBSHK a strong performer in CX performance Leading in HK wealth management
Differentiated and customized CX to meet different customer segment needs**

Hong Kong, April 28, 2021 — Everbright Sun Hung Kai Company Limited (“Everbright Sun Hung Kai”, “EBSHK” or the “Company”) is pleased to announce that in a customer experience (CX) survey of retail investors, EBSHK, which outperformed the industry average in overall CX performance, ranks in the forefront among its wealth management peers including retail banks. On this basis, the Company will carry out its “Customer Experience Development Strategy” to differentiate and customize products and services in accordance with the habits and preferences of different investor segments to satisfy clients’ ever-changing needs.

As a professional wealth management institution for more than 50 years, Everbright Sun Hung Kai constantly enhances its end-to-end customer journey experience. In order to understand the wealth management needs and expectations of different customer segments at different stages in a more comprehensive, in-depth and multi-dimensional manner, the Company commissioned global market research agency Forrester Consulting to conduct an online survey of thousands of retail investors on their customer experience with major banks and securities firms based on the CX Index™ framework from October to November 2020. According to Forrester Consulting, the results show that EBSHK is an industry strong performer in customer experience in wealth management in Hong Kong. The key findings of the survey are as follows:

- ▲ **EBSHK a strong performer in CX performance, leading retail bank and broker peers**
Everbright Sun Hung Kai scores above the industry average in overall customer experience performance, as a strong performer among its wealth management peers including retail banks and brokers, highlighting EBSHK is an industry leader.
- ▲ **Online-offline hybrid servicing mode**
Regarding service models, although COVID-19 made face-to-face communication difficult and promoted the rapid popularization of online modes, the survey found that customers gave the highest scores to the online-offline hybrid servicing mode. This shows that despite the convenience of online investment and wealth management means, investors think the combination of Wealth Managers (offline) and digital services (online) can better meet their needs.
- ▲ **Quality and humanized customer services**
With respect to the customer life cycle, EBSHK scored the highest in the industry in the “Ask” and “Use” stages, revealing the Company’s robust performance in its humanized offline services provided by its Wealth Managers, along with the online communication for investment after-sales services, is highly recognized by customers. The survey also found that customers are comfortable with interacting via just digital channels during the “Buy” and “Use” stages, especially in viewing market and account information. At the “Explore” and “Ask” stages, hybrid interactions are most common, and there is greater reliance on offline interactions for advice and assistance at the “Ask” stage.

▲ **Successful positioning strategy for high-end investors**

Among the various customer tiers, high-net-worth customers gave a higher score to customer experience offered by Everbright Sun Hung Kai. This reflects EBSHK’s high-end wealth management products and services, including Asset Power, integrated trust services and wealth management solutions, together with the professional, thoughtful services provided by EBSHK Wealth Managers, are well received and highly rated by customers.

▲ **Excellent reputation, strong financial background and reliable**

In terms of brand recognition, EBSHK’s overall score is higher than the industry average. The Company’s outstanding brand reputation, strong financial strength and reliability are widely known and recognized by investors.

EBSHK Deputy CEO Kevin Tai says, “We value customer experience and strive for excellence at every customer touch point. This survey provides an important basis for our ‘Customer Experience Development Strategy’. By enhancing the customer experience of different channels, we are committed to providing more efficient, convenient and smarter financial services to customers of various investor segments. Looking to the future, under a strict compliance framework, we aim to create differentiated and customized customer experiences to promote new milestones in the wealth management business.”

To thank clients for providing valuable feedback in the survey, in February, Everbright Sun Hung Kai made a donation to Heep Hong Society, a charitable education and rehabilitation organization that provides professional training and services to children and young people with special educational needs, contributing to good causes in joint hands with clients.

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About Everbright Sun Hung Kai Company Limited

Everbright Sun Hung Kai Company Limited (“EBSHKCL”) is a leading wealth management institution with five key business segments: Wealth Management, Corporate Finance & Capital Markets, Institutional Business, Asset Management, Investment & Financing, serving individual, corporate and institutional clients in Hong Kong, Macau, Mainland China and the United Kingdom.

As an international business platform of Everbright Securities Company Limited (“Everbright Securities”, SSE: 601788, HKEX: 6178), EBSHKCL together with its associated companies[^] operate under the Everbright Sun Hung Kai brand (“EBSHK”) and Everbright Securities brand, as well as the EBSHK Direct and EBSHK Private sub-brands.

Backed by Everbright Securities and China Everbright Group, coupled with its heritage in the financial industry beginning in 1969, EBSHKCL has emerged to be a full-fledged financial platform providing excellent global financial services with Moody’s “Baa3” long-term issuer and “Prime-3” short-term issuer credit ratings. The customer assets of EBSHKCL and its associated companies are currently about HK\$138 billion*. For more information, please visit www.ebshk.com.

[^] This refers to EBSHKCL, China Everbright Securities International Limited and their respective subsidiaries and affiliated companies.

* As of March 31, 2021

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