



# Everbright Sun Hung Kai Company Limited Corporate Fact Sheet

Everbright Sun Hung Kai Company Limited (“EBSHKCL”) is a leading wealth management institution that provides excellent cross-border and global financial services. As an international business platform of Everbright Securities Company Limited (“Everbright Securities”, SSE: 601788, HKEX: 6178), and an affiliated company of Sun Hung Kai & Co. Limited (HKEX: 86), EBSHKCL capitalizes on Everbright Securities’ experience, and Sun Hung Kai Financial’s heritage in the financial industry beginning in 1969, to serve individual, corporate, and institutional clients in Hong Kong, Macau, Mainland China, and the U.K. With its robust operational and financial strengths, and extensive risk management capabilities, EBSHKCL is assigned “Baa3” long-term issuer and “Prime-3” short-term issuer ratings by Moody’s.

## Scope of Business



## Brands

Operating under the “Everbright Sun Hung Kai” brand (“EBSHK”) as well as the “EBSHK Direct” and “EBSHK Private” sub-brands.

## Assets under Management, Custody, and/or Advice

More than HK\$120 billion (as of Jun 30, 2020)

## Total Staff

About 1,000

## Website

[www.ebshk.com](http://www.ebshk.com)

## Executive Leadership

- ▲ Li Bingtao – Executive Director & Chief Executive Officer
- ▲ Kevin Tai – Deputy CEO (Wealth Management & Brokerage)
- ▲ Sun Yi – Deputy CEO (Asset Management)
- ▲ Shen Jie – Deputy CEO (Greater China Cross-border Business)
- ▲ William Yeung – Deputy CEO (Corporate Finance & Capital Markets)
- ▲ Catherine Law – Chief Financial Officer

## Vision, Mission, and Core Values

Our company’s vision, mission, and values are the cornerstones of our culture. They guide our strategy and define our overarching goals.



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光大新鴻基  
EVERBRIGHT SUN HUNG KAI

A member of China Everbright Group



## Vision

- ▲ Be a forerunner in the financial industry with international footprints

## Business Philosophy

- ▲ Provision of a full-fledged financial platform with internationalization strategy
- ▲ Relentless product and service innovation, capitalizing on our strong legacy
- ▲ Customer is at the heart of everything we do
- ▲ Retaining and attracting the best talent
- ▲ Ensuring a strong technological base to empower us and our customers

## EBSHK Core Values

- ▲ We head towards our vision by ensuring that we remain focused on our six guiding principles: Sharing, Excellence, Integrity, Innovation, Prudence, and Professionalism, which plays a crucial role in our continued success.

## Our Community

As one of the leading wealth management institutions in Hong Kong, we apply our unique set of expertise and our spirit of innovation to contribute back to the community in which we operate and grow our business to where we are today. Partnering with NGOs, we are focused on financial education, healthcare, sports, and the environment. We were one of the first companies to be named a Caring Company by the Hong Kong Council of Social Service, a recognition of our commitment to improving the lives of the underprivileged in Hong Kong.

## Awards

- ▲ Brand and services awards:

 <p>Securities Company of the Year – Outstanding 2020</p>	 <p>Wealth Management Platform – Outstanding 2019, 2020</p>	 <p>Corporate Finance Deal – Outstanding 2018-2020</p>	 <p>Digital Innovation – Excellence 2018, 2020</p>	 <p>Junding Award for Hong Kong All-round Securities Brokerage 2019, 2020</p>	 <p>Financial Planning BEST-IN-CLASS 2018</p>	 <p>Outstanding IFA Award (Over 100 Seats) 2018</p>
 <p>Best Brokerage, Hong Kong 2012, 2017-2018</p>	 <p>Wealth Management Advisory of the Year 2017</p>	 <p>Best Local Brokerage in Hong Kong 2009, 2014</p>	 <p>Best Broker Hong Kong 2007-2010, 2012</p>	 <p>Excellent Brand of Securities Firm 2014-2020</p>	 <p>Award of Excellence – Securities Investment Services 2019</p>	 <p>The Best "Securities Firm" Service Award 2007-2008, 2011-2019</p>
 <p>15 Years Plus Caring Company 2002-2020</p>	 <p>Manpower Developer 2016-2022</p>	 <p>Good MPF Employer Award 2014-2020</p>	 <p>Capital Market Star Investment Bank Award 2019</p>	 <p>Best IPO Project Sponsor 2016</p>	 <p>Outstanding Online Securities Investment Management Platform 2017</p>	

- ▲ Business and other awards: