



# Everbright Sun Hung Kai Company Limited Corporate Fact Sheet

Everbright Sun Hung Kai Company Limited (“EBSHKCL”) is a leading full-service financial institution that provides excellent cross-border and global financial services. As a subsidiary of Everbright Securities Company Limited (“Everbright Securities”, SSE: 601788, HKEX: 6178), and with Sun Hung Kai & Co. Limited (HKEX: 86) as its substantial shareholder, 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.

## 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

Approximately HK\$103 billion (through subsidiaries, as of December 31, 2017)

## Total Staff

About 1,000

## Website

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

## Executive Leadership

- ▲ Li Bingtao – Chief Executive Officer
- ▲ Kevin Tai – Deputy CEO (Wealth Management & Brokerage)
- ▲ Sun Yi – Deputy CEO (Asset Management)
- ▲ Li Xin – Deputy CEO (Investment & Structured Financing)
- ▲ William Yeung – Deputy CEO (Corporate Finance & Capital Markets)
- ▲ Shen Jie – Deputy CEO (Greater China Cross-border Business)
- ▲ William Yan – Chief Financial Officer
- ▲ Joe Wan – Chief Risk 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.



## 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 financial 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:

 Best Brokerage, Hong Kong – The Asset Triple A Awards The Asset (2012, 2017)	 Wealth Management Advisory of the Year (2017)	 Wealth Management Platform – Excellence (2017)	 Best Local Brokerage in Hong Kong (2009 and 2014)	 Best Broker Hong Kong (2007-2010, 2012)	 Best Equity House Hong Kong (2009)
 Best-in-Class – Client Servicing (2013)	 Excellent Brand of Securities Firm (2014-2017)	 The Outstanding Securities Company (2011-2017)	 The Best "Securities Firm" Service Award (2007-2008, 2011-2016)	 Outstanding Brand Award – Securities Company (2008-2013)	 Customer Marketing – Outstanding Broker Category (2013)

- ▲ Business and other awards:

 15 Years Plus Caring Company (2002-2017)	 Manpower Developer (2016-2018)	 Good MPF Employer Award (2014-2017)	 Outstanding Online Trading Platform (2017)	 Silver award – Best E-Commerce Merchant – Financial Services (2017)	Best Country Deals Awards – Hong Kong & Regional Capital Markets Awards – Best IPO Award GlobalCapital Asia/Asiamoney (2015)
---	---	--	---	---	--