



# 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. 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

Over HK\$138 billion (through subsidiaries, as of March 31, 2018)

## 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)
- ▲ Li Xin – Deputy CEO (Investment & Structured Financing)
- ▲ William Yeung – Deputy CEO (Corporate Finance & Capital Markets)
- ▲ Shen Jie – Deputy CEO (Greater China Cross-border Business)
- ▲ Joe Wan – 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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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 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:



Securities Company of the Year – Excellence (2018)



Best Brokerage, Hong Kong (2012, 2017)



Wealth Management Platform – Excellence (2017-2018)



Wealth Management Advisory of the Year (2017)



Best Local Brokerage in Hong Kong (2009, 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 (2014-2018)



The Outstanding Securities Company (2011-2018)



The Best "Securities Firm" Service Award (2007-2008, 2011-2017)



Outstanding Brand Award – Securities Company (2008-2013)

- ▲ Business and other awards:



15 Years Plus Caring Company (2002-2018)



Manpower Developer (2016-2020)



Good MPF Employer Award (2014-2017)



Corporate Finance Deal – Outstanding (2018)



Best IPO Project Sponsor (2016)



Outstanding Online Securities Investment Management Platform (2017)