

Portfolio Management

The basis for a good
Portfolio Management
is knowledge.
But there are other
principles.

PWM | THE BANKER

GLOBAL PRIVATE
BANKING AWARDS
2024

WINNER

Best Private Bank in Portugal

PWM Award and The Banker:
“Global Private Banking Awards
2024” category, in 2024.
This award is the sole
responsibility of the entities
that awarded it.

Millennium
private banking

Knowledge is capital

An aerial photograph of a coastal landscape. The top half of the image shows a large body of turquoise water. A prominent, narrow, orange-brown landmass or sandbar runs diagonally from the top right towards the center. Below this, the water transitions to a darker teal color. The bottom half of the image is dominated by a large, dark teal area, possibly a bay or a different part of the coastline. The overall scene is a mix of natural colors and textures, suggesting a unique geographical location.

Knowledge is capital

At Millennium Private Bank we are faithful to our principles and offer you a professional portfolio management service that transforms the available information into useful and targeted knowledge. So that you can dedicate your time to what you like to do most and to the people who enrich your life.

Lago salgado
Austrália



Experience and Expertise

Decisions that create value

We have an experienced team, specialized in portfolio management. Experience, associated with the ongoing monitoring of markets, enable us to manage risks in a professional manner and reach consistent results, reducing the probability of errors associated to hasty and emotional decisions.

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Your profile as an investor is the starting point for structuring a global and diversified portfolio.



Ponto James Price
The Kimberley, Austrália

Diversifying Risk

A resilient and personalised portfolio

Your profile as investor is the starting point for the making of a global and diversified investment portfolio with the purpose of reaching the best level of yield, matching your risk tolerance.

We diversify and manage risk so that your portfolio is not directly affected by specific factors connected with a single company, a single sector or even a single country.

We implement several diversification levels – groups of assets, geographic regions, activity sectors, managers - with the purpose of providing you with a portfolio that deals with several types of markets in the most resilient way possible.

Effectiveness and Efficiency

A Global Investment

Not putting all the eggs in the same basket diversifies the risk, but to analyse and individually invest in thousands of shares and bonds could prove being an impossible task for an individual investor, implying extremely high operational costs. Our portfolio management service allows you to invest globally and efficiently, just like a large institutional investor.



Integrated Expertise

A high degree of expertise

To the experience of Millennium bcp we associate the experience of a wide number of international experts who work daily for you and for your portfolio.

For you to benefit from the highest level of expertise in each group of assets, region and activity sector, we select managers by means of a rigorous and structured process that combines the assessment of Performance, of the Investment Process and of management key-persons.

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Select and Interpret

Get rid of the noise and subcontract the stress

In a world swamped with information, what really makes the difference is knowing how to select and assess what is truly relevant. We not only have access to information, which is independent and of quality, but also dispose of professionals prepared to interpret and decide on a well-informed basis.

Disconnect from the anxiety associated with the daily activities of the markets and subcontract the stress generating activities to a team specialised in the analysis and interpretation of the market and economic indicators, which may crucially influence your portfolio.

Focused Analysis

Avoid hasty decisions

The markets are often moved by emotional decisions disconnected from the most likely performance of economies and markets. Our function is to objectively analyse the information and manage it on the basis of the most likely scenarios, avoiding decisions based on extreme and unlikely scenarios.

Active Management

A rigorous process

We adjust your portfolio to the performance of the economic prospects and select managers with the purpose of adding value in the time horizon of your investment.

We assume a systematic approach based on processes for the analysis and monitoring of the performance of economies, of markets and of a comprehensive universe of financial instruments, with the purpose of adequate your portfolio to the context and evolution prospects of the different groups of assets.

We look for, from a broad range of managers, those who are actively capable of, in a consistent manner, do better than the markets where they operate.





How does it work

Lago salgado
Austrália

The Portfolio Management

The Portfolio Management Service is based on:

- 1.** The assessment of your profile as an investor; this profile translates your needs, investment goals, investment time frame and risk tolerance.
- 2.** The definition of a diversified and optimized investment strategy, that matches your profile as an investor, based on four major groups of assets (liquidity and short term, bonds, shares and alternative investments), with maximum and minimum exposure parameters defined for each one of the groups.
- 3.** The selection of a group of managers specialized in each one of the assets sub-groups.
- 4.** The adequacy of the portfolio to market conditions and outlook, based on a systematic analysis to the performance of economies and markets.
- 5.** The information on the performance recorded by the portfolio and the monitoring made by an Investment Expert.

**The information
is complemented by
regular personalised
monitoring by an
Investment Specialist.**

Transparency and Proximity

Detailed information, step by step

Together with the portfolio management service, we also provide a monthly statement with information on all the portfolio's positions, the transactions made, the costs incurred, and the yield obtained.

That information is complemented by a regular and personalized follow-up made by an Investment Expert who is able to detail the performance of the portfolio and the investment decisions made, providing you with an increased degree of transparency.

Historical Performance

A service which has proved its worth

The more of 10-years historical performance of our portfolios demonstrate that, within the appropriate investment timeframes, they are able to add value versus the reference indexes they are associated to.

Millennium

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Lisbon

Tel.: +351 211 131 000 (call to national fixed network)
Rua Augusta 84, 1100-053 Lisboa

Cascais

Tel.: +351 211 138 760 (call to national fixed network)
Rua Sebastião José de Carvalho e Melo 6, 2750-483 Cascais

Oporto

Tel.: +351 220 044 190/+351 220 037 440/+351 220 037 510 (call to national fixed network)
Avenida Boavista 2706, 4100-119 Porto

Braga

Tel.: +351 253 008 370 (call to national fixed network)
Praça Conde Agrolongo 52, 4700-312 Braga

Aveiro

Tel.: +351 234 004 200 (call to national fixed network)
Cais do Cojo 12, 3800-133 Aveiro

The cost of the calls depends on the specific prices agreed with your operator.

www.millenniumbcp.pt

BANCO COMERCIAL PORTUGUÊS, S.A.

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