

Wealth Management in the Middle East

Dr. Mubashir Ahmed Sheikh

Managing Director, Regional Head - Fortis Banque Suisse S.A.



Dynamic ME Financial Markets – Where is the HNWI's money...

- Liquidity in Middle East.
- Uncertainty breeds opportunity.
- Which Asset Classes are attracting money.
- Future of regional Liquidity and where will it get invested.

Unlocking Wealth Guidelines:

“The role of Structuring in Wealth Management”

- Innovative Financial Solutions
- Structured Products with underline commercial business
- Raising liquidity for business through direct investments
- Providing total financial solutions
- Diverse Investment Solutions
- Importance of Direct Investing
- Value of professionally managed investments

Why Clients choose local banks as preferred wealth advisor over the top international brands. True or False!

- Value proposition of Local Banks
- Value Proposition of Foreign Banks
- Clients segmentation – which prefer to deal with Local Banks
- Clients segmentation – which prefer to deal with Foreign Banks
- Clients preference trends going forward.

Can Banks be local and act Global Vs can Foreign

Banks act local

Myth VS Reality

- The Myth Perspective.....
- The Reality Perspective.....
- Struggle for Local Banks
- Struggle for Foreign Banks
- Future of On Shore “REAL” Presence

Building Global Strategy for Islamic Wealth Management through Shariah Compliant products for clients

- Can there be a Global strategy for Islamic Wealth Management ? Yes / No
- Is Shariah compliant product only for Muslims ? Yes / No
- Value Creation from Shariah Compliant Products for sophisticated Clients.
- Strategy for Islamic Wealth Management – Different for Local VS Foreign Banks- Yes / No
- Future of Islamic Wealth Management in our Region.



Thank You

Dr. Mubashir A. Sheikh
Managing Director and Regional Head,
Middle East & Indian Sub Continent.