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**AVONBRIDGE CAPITAL**  
I N V E S T O R   G U I D E

# HNWI Guide to Alternative Strategies

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*Understanding the current landscape, what exists for high-net-worth investors, and how to evaluate systematic trading access.*

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*Structured Access to Systematic Trading Strategies*

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Avonbridge Capital acts as an introduction and access layer to third-party trading strategies. We do not provide investment advice, manage client funds, or take custody of assets. All onboarding, execution, and account management are conducted by regulated third-party providers. Past performance is not indicative of future results. Capital is at risk.

## SECTION 1

## The Current Landscape for HNWI Investors

High-net-worth individuals today face a challenging investment environment. Traditional equity and fixed income allocations face pressure from volatility, low real yields, and correlation risks. Many HNWIs are seeking alternative strategies to diversify their portfolios and access institutional-grade returns.

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## SECTION 2

## What Exists Today

The alternative investment space available to qualified investors includes several categories. Each carries its own profile of returns, liquidity, lock-up, and complexity.

### Systematic / Algorithmic Trading

Rules-based strategies operating across FX, commodities, and equities. Institutional-grade risk management. Typically accessed through managed accounts or regulated funds.

### Private Credit

Direct lending to businesses outside the traditional banking system. Offers non-correlated returns with tangible asset backing. Growing rapidly as banks retreat from certain lending markets.

### Private Equity

Direct investment in private companies. Long lock-up periods but potential for significant returns. Requires patience and typically high minimums.

### Real Assets

Commodities, real estate, infrastructure. Provides inflation protection and tangible value. Can be accessed through funds or direct investment.

### Hedge Funds

Broad category including long/short, macro, and event-driven strategies. Varies significantly in quality and approach. Requires careful due diligence.

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## SECTION 3

## Why Systematic Trading Stands Out

Among the available alternatives, systematic trading offers several distinctive characteristics that make it particularly relevant for HNWI investors:

- Verified live track records — Performance is based on actual trading results, not backtested models or hypothetical returns.
- Institutional-grade risk management — Diversification, position sizing, and drawdown controls are built into the strategy framework.
- Regulated structures — Access through authorised and regulated partners, with capital held in the investor's own name.
- Liquidity — Unlike private equity or real estate, systematic strategies typically offer daily liquidity and unrestricted withdrawals.
- Non-discretionary — Removes human emotion and bias from investment decisions, providing consistent, disciplined execution.
- Scalable — The same strategies that manage billions can be accessed at lower investment levels through appropriate structures.

## SECTION 4

## Evaluating Systematic Trading Access

When considering systematic trading strategies, HNWI investors should evaluate the following:

### Track Record

Is the performance based on verified live trading or backtested simulations? How long is the track record? Has it been independently audited?

### Regulation

Is the strategy operated through regulated infrastructure? What regulatory body oversees the execution partner? Where is capital custodied?

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## Transparency

Can you monitor account activity and performance in real time? Is reporting clear and comprehensive? Are fees fully disclosed?

## Risk Management

What drawdown controls are in place? How is capital diversified across systems and markets? What happens during extreme market events?

## Access Structure

How is the strategy accessed — managed account, fund, or mirrored execution? What are the minimum investment levels? How do withdrawals work?

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### SECTION 5

## The Avonbridge Capital Approach

Avonbridge Capital provides structured access to institutional-grade systematic trading strategies through regulated third-party infrastructure. We operate as an access and relationship layer — we do not manage funds, provide investment advice, or take custody of assets.

Our strategy partners include FINMA-authorized firms in Switzerland and FCA-regulated partners in the UK, with verified live track records and institutional-grade operational infrastructure. Capital is always held in accounts in the investor's own name.

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