ARK Wealth Management's Latest CIO Report Emphasizes the Power of Elimination as Investors Brace For Heightened Volatility

Feb 18, 2025

- ARK CIO research shows a paradigm shift in wealth management, moving beyond safety, liquidity, and returns toward a holistic, value-driven approach that prioritizes preservation over maximization.
- The Report introduces a three-tier strategic asset allocation framework: establishing a risk buffer, fortifying core holdings, and capturing growth opportunities.
- Insights combine deep industry knowledge with in-depth insights into the demands of Mandarin-speaking wealth managers and the best analysis of global economic trends.
- The Report centers on the theme: leveraging the process of elimination to identify the optimal solution.
- With multiple economic cycles converging, the Report urges wealth managers to shift from chasing returns to prioritizing rational analysis and capital preservation.

HONG KONG, Feb. 18, 2025 /PRNewswire/ -- Noah Holdings Limited's ("Noah" or "the Company") (NYSE: NOAH, HKEX: 6686) newly launched global wealth management platform for global Chinese investors, ARK Wealth Management, has released its H1 2025 CIO Report, which finds that a new investment philosophy is needed as markets brace for heightened volatility. Historic factors are driving these changes, including geopolitical uncertainties, diverging global monetary policies, and the rapid commercialization of AI.

The ARK Wealth CIO Report combines deep industry knowledge with in-depth insights into the demands of Mandarin-speaking wealth managers and the best analysis of global economic trends. The research reveals four major forces shaping the global investment landscape:

1. **Geopolitical and economic volatility:** A second Trump presidency and its trade policies, misaligned monetary policies across key global markets, and rising political risk require investors to rethink geographic asset allocation.
2. **The evolution of AI:** With AI transitioning from development to full-scale commercialization, investors must distinguish sustainable opportunities from speculative hype.
3. **The shift from investment to structured wealth management:** Chinese HNWIs are rapidly increasing offshore allocations, prioritizing government bonds, and embracing insurance and trust structures to protect generational wealth.

To navigate this environment, ARK Wealth Management is arguing for a shift from isolated investment decisions to constructing an "anti-fragile" system that can adapt to economic and political disruptions. The core transformation involves moving beyond the traditional three pillars—safety, liquidity, and returns—toward a more holistic, forward-looking, and value-driven approach

"We are now navigating historic changes in the macroeconomic landscape, marked by a shifting focus from returns to resilience," said Jingbo Wang, Co-founder and Chairwoman of Noah Holdings. "Investors and wealth managers require a disciplined, structured approach that integrates defensive assets, long-term planning, and growth-oriented opportunities. The question is no longer about where to invest, but how to structure wealth for longevity in an era of uncertainty."

The report introduces ARK Wealth's multi-layered asset allocation model, which starts with a "safety net" (insurance, trust structures, identity planning), builds a "foundation" (steady income, inflation hedges), and incorporates "growth" (equities, private equity, and high-upside assets). This framework provides investors with a structured approach to balancing security and opportunity, to position themselves for stability and success in the years ahead.

To download the full H1 2025 CIO report, please visit: https://promotion.arkwealth.com/activity/prod/7kY1tLez6S

About ARK Wealth Management

ARK Wealth Management is a leading provider of global wealth management services under Noah Holdings Limited (NYSE: NOAH, HKEX: 6686). ARK Wealth Management provides one-stop financial services for high-net-worth global Chinese families and institutions. With a client-centric philosophy that emphasizes independence and professionalism, ARK Wealth Management consistently innovates its product offerings and services to address the evolving needs of its clients, delivering sophisticated wealth management strategies with a goal of becoming the preferred wealth management platform for global Chinese investors.

ARK Wealth Management currently has over USD 8.7 billion in assets under advisement (AUA). With service centers in multiple countries and regions, ARK Wealth Management's team of 140+ global investment advisors focuses on providing tailored, localized financial services to clients.

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