

## Banyan Partners Shares Equity Investment Strategies at Bloomberg Private Investment Strategy Forum

May 29, 2025

In the first quarter of 2025, the global macroeconomic landscape experienced significant turbulence, driven by shifts in U.S. tariff policies and ongoing geopolitical tensions. Against this backdrop, Bloomberg is hosting a series of exclusive private investment strategy forums across four major Chinese cities—Shanghai, Shenzhen, Beijing, and Hangzhou.

On May 22, Xin of Banyan Partners was invited as a special guest speaker at the Bloomberg 2025 Private Investment Strategy Forum in Shanghai, where he shared insights drawn from his 15 years of global multi-market investment experience and explored in depth the firm's approach to equity investment strategies.



With China's economic recovery gaining traction, the domestic market has drawn significant attention from global investors. Opportunities for diversified asset allocation, both domestic and international, are increasingly apparent, prompting numerous global hedge funds to expand their footprint in China. Leveraging its deep roots and global perspective, Banyan Partners engaged in meaningful discussions with leading institutional investors and industry experts during the event.

In his keynote address, Xin emphasized the importance of bottom-up research, starting from granular corporate operations. By analyzing micro-level data from listed companies, he interpreted the dynamics of the industrial chain to understand broader macroeconomic trends. His presentation, particularly Banyan Partners' proprietary "Five-Star" Listed Company Screening Model, sparked strong interest among the audience.

Despite ongoing macroeconomic headwinds, resilient, high-quality companies continue to emerge in the A-share market. Using the Five-Star model, Banyan Partners identified over 100 companies in Q1 2025 that meet the firm's high standards.



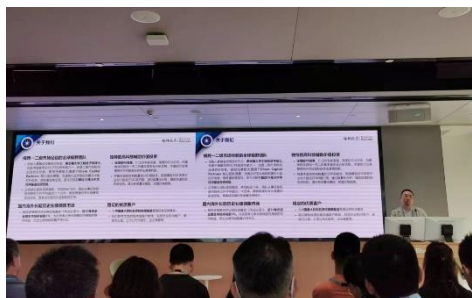


Throughout the forum, Bloomberg convened a diverse lineup of industry leaders and economists to share expert insights into navigating today's complex macro environment. Of particular note was the focus on artificial intelligence and cross-disciplinary integration of foundational technologies—key drivers not only of the tech sector but also of transformational changes in core functions such as asset allocation and risk modeling. As the asset management industry undergoes rapid digitalization, harnessing technology to enhance investment research has become a critical factor in maintaining competitive edge.

Other highlights of the closed-door event included discussions on factor-based trading strategies in A-shares and their international applications, Bloomberg's integrated research platform BQuant Desktop, and innovative derivative investment strategies. Experts from various sectors engaged in in-depth dialogue to address shared industry challenges and uncover pathways for long-term growth across market cycles.



As a long-term participant in capital markets, Banyan Partners remains committed to an open, collaborative approach. In an increasingly volatile environment, we recognize the growing demand for professional asset management. We are dedicated to helping our partners uncover long-term value across cycles. We warmly invite investors focused on sustainable capital market growth to join us in exploring forward-looking asset allocation strategies for this new era.



#### Disclosures

This document has been provided to you solely for information purposes and does not constitute an offer or solicitation of an offer or any advice or recommendation to purchase any securities or other financial instruments and may not be construed as such. The factual information set forth herein has been obtained or derived from sources believed by the author and Banyan Partners to be reliable but it is not necessarily all-inclusive and is not guaranteed as to its accuracy and is not to be regarded as a representation or warranty, express or implied, as to the information's accuracy or completeness, nor should the attached information serve as the basis of any investment decision. This document is intended exclusively for the use of the person to whom it has been delivered by Banyan Partners, and it is not to be reproduced or redistributed to any other person. The information set forth herein has been provided to you as secondary information and should not be the primary source for any investment or allocation decision. Past performance is not a guarantee of future performance.