



StashAway

Press kit

StashAway in a nutshell

[StashAway](#) is a data-driven digital wealth management platform that personalises financial planning and portfolio management for the vast range of needs of both retail and professional investors.

It was founded on the belief that redefining wealth management is more than creating an app and a modern user experience; it's about making sophisticated investment strategies accessible to the mass affluent, leveraging advanced technology and data, and establishing trust with consumers as their world becomes increasingly mobile, technological, and ultra-personalised.

Key facts

Founded in 2016 by Michele Ferrario, former Group CEO of ZALORA; Freddy Lim, former Managing Director and Global Head of Derivatives at Nomura; and Nino Ulsamer, founder of multiple successful software companies around the world. The investment product was [launched in July 2017](#).

StashAway HK is licensed by the Securities and Futures Commission (SFC) in Hong Kong for Type 1 (dealing in securities), Type 4 (advising on securities) and Type 9 (asset management) regulated activities.

StashAway is headquartered in Singapore and holds a Capital Market Services License for Retail Fund Management from the Monetary Authority of Singapore and a CMS Digital Investment Management license from Malaysia's Securities Commission. StashAway is incorporated in the DIFC and holds a license to provide investment advisory and asset management from the DFSA.

- \$25 million USD Series D in April 2021
- \$16 million USD Series C in July 2020
- \$12 million USD Series B in July 2019
- \$5.3 million USD Series A in March 2018
- \$2.5 million USD Pre-series A round in May 2017
- \$600,000 USD seed round in November 2016

Awards and recognition



2020

World Economic Forum
Technology Pioneer

Past recipients include Google,
Airbnb, Palantir, Twitter, Spotify.



2020

LinkedIn
Top 10 Startups



2019

Fintech Global's Wealthtech
100 List



2017

Wild Digital Startup
Disruptor of the Year



2018

HSBC Innovfest Unbound
Top Winner



2018

Singapore Business Review
Top 20 Hottest Startups



2017

Singapore Rice Bowl
Startup Awards Winner for
Best FinTech Startup &
Best Startup of the Year

USPs



Strong returns because we rely on data, not luck



Easy access to global ETFs



Free, unlimited rebalancing



Intelligent risk management to navigate your money through any economic condition



Decades of relevant experience with a proven track record to show



A single management fee of just 0.2% to 0.8% per annum

Investment strategy

Our investment team designed an investment strategy that focuses on maximising returns while maintaining a given risk level under any economic condition. We call the investment strategy, Economic Regime-based Asset Allocation, or ERAA.

ERAA is designed to navigate the ups and downs of economic cycles, and it ignores market noise. Our system manages each portfolio's asset allocation based on how the asset classes historically perform in similar economic environments. In short, when economic data indicate a change in the economic environment or a valuation gap in an asset, the technology prepares the affected portfolio by re-adjusting the asset allocation to maintain the determined risk levels set by each individual client. After in-depth backtesting, we confirmed that ERAA would have outperformed in risk-adjusted terms during the global financial crisis of 2008, as well as over even longer time horizons.

More information on [ERAA](#) here.

Technology

Our technology is what supports the investment framework. It builds dynamic, personalised portfolios for each client by considering personal factors, such as salary, age, risk tolerance, and time horizon to reach a goal, and then combines those with external factors, such as the market and economic conditions, and inflation.

The technology manages the portfolio to ensure that the personal settings are always accounted for in the face of changing economic and market conditions that it looks out for.

All security trading happens automatically and aggregately, which maximises efficiency that we pass along to our customers in the form of lower fees.

Our team



Michele Ferrario
Chief Executive Officer,
Co-Founder

16 years of experience in
the financial industry and
ecommerce

[Find Michele on LinkedIn](#)



Freddy Lim
Chief Investment Officer,
Co-Founder

19 years of experience in
cross-asset investing and
portfolio management

[Find Freddy on LinkedIn](#)



Nino Ulsamer
Chief Technology Officer,
Co-Founder

16 years of experience in
technology and building
internet companies

[Find Nino on LinkedIn](#)



Stephanie Leung
Director
Head of StashAway HK

17 years of experience in
cross-asset investing

[Find Stephanie on LinkedIn](#)

Our board of directors



Aaron Rozario
Director

10+ years of experience in financial institutions, fintech, and venture capitals



Raj Dugar
Non-executive Director

15+ years of leadership experience in private equity and banking



Hwee Hoon Sim
Independent
Non-Executive Director

10+ years of experience as a Managing Director in C-suite positions in banking



Tushar Roy
Non-executive director

10+ years of experience in growth and advisory

Want to know more?

Media Contact

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Contact us

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