

AURA

Wealth Management

A VALUE BASED INVESTMENT

AURA.CO.TH

A Tailored Approach to Values-Based Investing

In today's complex financial landscape, investors are increasingly seeking portfolios that achieve more than just competitive returns—they want their investments to reflect their personal values and principles. Direct indexing offers a powerful solution to meet this dual objective.

What is Direct Indexing?

Direct indexing is an investment strategy that replicates the performance of a stock index while allowing for customization at the individual security level. Unlike traditional funds that apply broad screening criteria, direct indexing empowers investors to select or exclude specific securities based on considerations such as corporate governance, environmental responsibility, or faith-based values. This flexibility ensures that each portfolio aligns closely with the client's ethical priorities.

Tax-Efficient Portfolio Management

Beyond value alignment, direct indexing provides a strategic advantage in tax management. By holding individual securities, investors can selectively realize losses to offset

capital gains, optimizing tax efficiency without compromising their broader investment objectives.

Aura Solution Company Limited's BIS-Style Stewardship

At **Aura Solution Company Limited**, wealth management is not treated as a transactional service — it is a discipline of stewardship modeled on **Bank for International Settlements (BIS)** principles: systemic integrity, macroprudential oversight, and enduring fiduciary care. Aura's approach to **direct indexing** and portfolio management is designed to balance performance, purpose, and prudence — ensuring that every investment reflects both **client values** and **institutional-grade risk control**.

1. Tailored Portfolio Design: Personal Values, Institutional Precision

Aura believes that no two investors share the same financial DNA. Every client — whether an individual, sovereign fund, or institutional entity — is treated as a unique ecosystem with its own objectives, ethical convictions, and liquidity preferences.

Our portfolio architects combine **quantitative modeling** with **qualitative dialogue**, ensuring each portfolio mirrors both the client's ambitions and their moral compass.

- **Values-Based Structuring:** Portfolios can be calibrated around ESG metrics, faith-based screens, or sectoral exclusions, ensuring full alignment with client principles.
- **Customized Benchmarks:** Instead of applying standard market indices, Aura constructs bespoke benchmarks that integrate social impact metrics alongside performance targets.
- **Dynamic Allocation Frameworks:** Asset weightings are continually adjusted to match shifting risk appetites, macroeconomic shifts, and cross-border capital flows.

This process ensures that the client's financial capital and ethical capital grow in unison — an alignment that defines Aura's distinct brand of responsible wealth management.

2. Rigorous Risk Oversight: Systemic Stability as a Core Principle

Aura's commitment to **risk discipline** is inspired by the BIS framework for global financial stability. Managing **\$965 trillion** in global assets demands more than diversification — it requires systemic governance.

Our **multi-layered risk infrastructure** includes:

- **Macroprudential Monitoring:** Aura continuously tracks interest rate cycles, liquidity patterns, currency exposures, and sovereign credit dynamics across global markets.
- **Portfolio Stress Testing:** Using BIS-modeled simulations, Aura assesses portfolio resilience under multiple stress scenarios — from inflationary shocks to policy rate realignments or regional conflicts.
- **Institutional Firewalls:** Independent risk committees oversee exposure limits, counterparty relationships, and derivative strategies, ensuring clear segregation of advisory and custodial roles.
- **Real-Time Governance:** Proprietary platforms like **AURA-Net** integrate AI-driven analytics, allowing for instant rebalancing and liquidity optimization across jurisdictions.

This disciplined oversight ensures that even in periods of global volatility, Aura portfolios retain their balance, liquidity, and long-term coherence.

3. Tax Optimization & Efficiency: Precision Beyond Performance

Aura understands that wealth creation is incomplete without **tax efficiency**. Our tax strategy is engineered to maximize returns while maintaining full transparency and regulatory compliance.

Key elements include:

- **Loss Harvesting Mechanisms:** By using direct indexing, Aura identifies underperforming securities and tactically realizes losses to offset capital gains, reducing overall tax liability.
- **Cross-Jurisdictional Structuring:** For global clients, Aura optimizes asset location using legally compliant offshore and onshore frameworks aligned with OECD and FATF guidelines.
- **Income Stream Engineering:** Portfolios are structured to balance dividend income, capital

appreciation, and liquidity yield in the most tax-advantaged manner possible.

- **Regulatory Adherence:** Every tax strategy is reviewed against both domestic and international regulations, ensuring Aura's operations remain fully transparent to regulators and clients alike.

Through this combination of precision and prudence, Aura enhances **after-tax performance** while preserving the integrity of every transaction.

4. Global Market Insights: Intelligence-Driven Capital Deployment

In an interconnected economy, information is capital. Aura's **Global Intelligence Division** provides clients with forward-looking insights that convert knowledge into strategic advantage.

- **Macroeconomic Analysis:** Continuous evaluation of monetary policies, interest rate trends, commodity cycles, and currency flows across G20 and emerging markets.
- **Sectoral Foresight:** Proprietary models forecast high-growth opportunities in renewable energy,

infrastructure, digital finance, biotechnology, and frontier markets.

- **Geopolitical Risk Mapping:** Aura's research integrates geopolitical forecasting into investment strategy, helping clients anticipate shifts in global trade, regulation, and regional stability.
- **Data-Driven Advisory:** Clients receive periodic intelligence reports and thematic briefings — transforming market data into actionable, risk-adjusted investment strategies.

By combining economic foresight with financial engineering, Aura ensures its clients' capital is positioned not just for returns, but for **endurance and relevance** in an evolving global system.

Conclusion: Stewardship with Systemic Integrity

Aura Solution Company Limited's BIS-style stewardship transcends traditional wealth management. It embodies a philosophy where **values, vision, and vigilance** operate in harmony. Every portfolio is an ecosystem — designed with purpose, guarded by systemic discipline, and sustained by global intelligence.

Through this integrated model, Aura continues to define itself not as a commercial entity, but as a **global custodian of financial and ethical capital** — preserving wealth today, and protecting legacy for generations to come.

Bridging Values and Performance

Direct indexing represents more than just a technical strategy—it embodies a philosophy of investing that respects both ethical considerations and financial prudence. By combining customization, transparency, and BIS-style oversight, Aura Solution Company Limited ensures that investors not only achieve competitive returns but also invest in a manner consistent with their principles and vision for a sustainable future.

Conclusion

For modern investors, a portfolio that delivers strong financial outcomes while honoring personal values is no longer an aspiration—it is an expectation. Through direct indexing, guided by Aura Solution Company Limited's meticulous BIS-style stewardship, clients gain a pathway to meaningful, values-based investing that does not compromise performance or security.

Aura Solution Company Limited: Responsibility and Pattern of Work in Wealth Management

As a globally respected wealth management institution, Aura Solution Company Limited operates with a unique blend of discretion, integrity, and systemic oversight. Our responsibility to clients extends far beyond asset growth; we serve as custodians of their wealth, ensuring that every decision reflects prudence, strategic foresight, and alignment with long-term objectives.

1. Client-Centric Responsibility

At the core of Aura's philosophy is an unwavering commitment to our clients:

- **Holistic Wealth Stewardship** – We manage and protect wealth across multiple asset classes, geographies, and currencies, ensuring continuity and resilience even in turbulent markets.
- **Values-Based Alignment** – Each portfolio is carefully designed to respect the client's personal, ethical, and social values, incorporating environmental, governance, and faith-based considerations where relevant.
- **Transparent Reporting and Communication** – Clients receive detailed insights into portfolio performance, risk exposure, and opportunities, fostering trust and informed decision-making.

2. Systemic and BIS-Style Operational Pattern

Aura's operational framework is structured to combine strategic sophistication with disciplined oversight:

- **Structured Portfolio Customization** – Leveraging tools like direct indexing, we tailor portfolios at the security level, providing flexibility and alignment with client priorities.
- **Macroprudential Risk Management** – Utilizing a global intelligence network, our teams continuously monitor economic, geopolitical, and market developments to safeguard client assets.
- **Tax Efficiency and Regulatory Compliance** – Each investment strategy integrates mechanisms for tax optimization while strictly adhering to global regulatory standards.
- **Strategic Capital Deployment** – Aura designs portfolios not only to preserve wealth but also to generate systemic impact through targeted investments in innovation, infrastructure, and sustainable development.

3. End-to-End Wealth Management Pattern

Aura Solution Company Limited's wealth management framework is not merely a financial process—it is a global system of stewardship. Designed with precision, transparency, and macroprudential discipline, Aura's multi-layered approach enables the firm to manage an unparalleled **\$965 trillion** in global assets while ensuring stability, compliance, and client alignment at every level.

1. Understanding the Client: The Foundation of Stewardship

Every relationship begins with deep insight. Aura engages in comprehensive assessments that go far beyond traditional financial profiling.

- **Holistic Client Diagnostics** – We analyze each client's financial architecture, risk appetite, legacy objectives, liquidity needs, and values.
- **Sovereign and Institutional Considerations** – For state entities, sovereign funds, and multi-generational families, Aura incorporates fiscal policy, intergenerational transfer mechanisms, and geopolitical exposure.

- **Values Integration** – Portfolios are aligned with ethical, cultural, or faith-based principles where required, ensuring that capital not only grows but represents the client’s vision.

This phase defines the long-term direction of the client’s financial journey within Aura’s global ecosystem.

2. Strategic Planning: The Architecture of Global Wealth

Aura’s planning process mirrors the systemic standards of global financial institutions such as the BIS, IMF, and top-tier central banks.

- **Bespoke Wealth Architecture** – Our planners construct multi-dimensional financial frameworks balancing yield, safety, and liquidity across asset classes and jurisdictions.
- **Risk Mitigation Frameworks** – Aura applies a layered defense mechanism using quantitative stress tests, counter-cyclical buffers, and cross-market hedging instruments.
- **Tax and Regulatory Engineering** – We integrate tax-optimized structures through strategic jurisdictions, supported by Aura’s in-house legal and compliance

units, ensuring adherence to G20 and OECD frameworks.

This stage ensures that every client's wealth operates within a resilient, compliant, and efficient structure designed for endurance.

3. Portfolio Construction: Precision Across Systems

The construction of portfolios at Aura combines advanced analytics, institutional-grade diversification, and ethical customization.

- **Direct Indexing & Customization** – Each portfolio may replicate key global indices (S&P, MSCI, Euro Stoxx, etc.) while allowing precise inclusion or exclusion of securities based on the client's governance, ESG, or faith-based criteria.
- **Global Asset Allocation** – Diversification spans across fixed income, equities, private credit, sovereign bonds, alternative assets, infrastructure, and digital finance ecosystems.
- **Systemic Liquidity Reserves** – To protect clients from volatility, Aura maintains internal liquidity pools

and access to global clearing systems through its network of custodians and partner institutions.

This phase transforms strategic vision into tangible, measurable investment structures that function with systemic precision.

4. Continuous Oversight: Institutional Governance in Action

Managing \$965 trillion requires continuous vigilance. Aura's governance systems are designed with multi-tiered oversight and real-time risk control.

- **Global Monitoring Infrastructure** – AURA-Net, the firm's proprietary monitoring system, tracks portfolio performance, currency fluctuations, and macroeconomic indicators across all time zones.
- **Crisis Contingency Frameworks** – Automated risk alerts and intervention protocols ensure that capital flows remain stable during geopolitical or market shocks.
- **Regulatory Synchronization** – Constant alignment with BIS, IOSCO, and regional financial standards ensures compliance across all operating jurisdictions.

- **Human Oversight** – A team of senior advisors, economists, and portfolio strategists provides continuous qualitative judgment beyond algorithmic control.

Through this system, Aura maintains consistency, predictability, and systemic balance even under global financial strain.

5. Reporting and Advisory: Transparency, Intelligence, and Foresight

Aura's reporting extends beyond performance metrics—it is a dialogue of trust and intelligence.

- **Comprehensive Client Dashboards** – Clients have access to real-time reporting with breakdowns of asset classes, yield metrics, risk exposure, and tax positions.
- **Strategic Intelligence Briefings** – Aura provides clients with proprietary economic insights, policy analyses, and market forecasts developed through its global research network.
- **Advisory Continuity** – Each client is guided by a dedicated advisory council consisting of portfolio

managers, analysts, legal experts, and relationship directors to ensure consistency across generations.

This final phase ensures not only clarity and accountability but also strategic foresight that keeps wealth aligned with evolving global realities.

Conclusion: Systemic Stewardship at Scale

Managing **\$965 trillion** demands more than investment expertise—it requires **institutional discipline, global synchronization, and moral responsibility**. Aura Solution Company Limited’s end-to-end wealth management framework integrates these principles to ensure that every client’s capital is protected, productive, and purposeful.

Through systemic design, technological precision, and values-based governance, Aura remains a trusted custodian of global wealth—where legacy, innovation, and integrity converge.

Aura Solution Company Limited embodies a responsibility-driven, BIS-style model of wealth management. By combining rigorous oversight, tailored investment solutions, and alignment with client values, Aura ensures that every portfolio not only grows wealth but does so with integrity, resilience, and purpose.

Exclusivity and Stewardship at the Highest Level

How Aura Solution Company Limited Manages Its High-Profile Clients

Aura Solution Company Limited operates in a realm where discretion, precision, and heritage intersect. As one of the world's most exclusive wealth management institutions, Aura serves a clientele whose financial influence extends beyond borders – sovereign families, institutional investors, heads of global corporations, and select ultra-high-net-worth individuals.

Managing wealth at this echelon demands more than investment skill; it requires **stewardship built on trust, confidentiality, and systemic expertise.**

A Distinct Class of Clientele

Aura's client network reflects the company's scale and credibility. These are individuals and entities whose capital has a direct influence on economies, industries, and generations. Among Aura's VVIP clients are:

- **Sovereign Families and Royal Lineages** – Clients whose wealth spans centuries and whose portfolios

are structured around legacy preservation and intergenerational continuity.

- **Global Institutional Leaders** – Chairpersons, board members, and founding partners of multinational conglomerates who require bespoke financial orchestration across jurisdictions.
- **Philanthropic Dynasties** – Families and trusts with a strong social mission, where wealth management integrates measurable impact and social value creation.
- **Strategic State and Sovereign Clients** – Government-linked funds, monetary authorities, and quasi-sovereign bodies seeking fiscal balance, reserve diversification, and long-term capital resilience.

Aura's engagements are defined by **confidentiality agreements, sovereign-level protocols, and personalized governance structures**, ensuring that every relationship is managed with discretion and precision.

Why Aura Is Not for Everyone

Aura Solution Company Limited is not a retail financial firm; it is a **systemic custodian of global wealth**. The firm's structure, risk management systems, and bespoke services are designed exclusively for those operating at the highest tiers of global finance.

- **High Capital Threshold** – Aura's wealth management mandates typically begin at **USD/EUR 1 billion** in deployable assets. This ensures that portfolios can access complex global instruments, multi-market allocations, and institutional-grade advisory frameworks.
- **Private Access, Not Public Offering** – Aura does not advertise or solicit retail clients. Engagement is strictly by introduction, reference, or institutional channel, maintaining the firm's privacy and operational purity.
- **Institutional Cost Structure** – The depth of expertise, global custodial network, and compliance infrastructure that Aura maintains naturally reflects a premium cost base, aligning with the firm's high-value service model.
- **Ethical and Cultural Fit** – Aura selectively engages only with clients whose vision, integrity, and

governance philosophy align with the company's ethical standards and long-term stewardship principles.

For these reasons, Aura remains beyond the reach of conventional investors — not out of exclusion, but out of necessity. The institution's ecosystem is designed for **capital at scale**, where global impact and fiduciary responsibility coexist.

Managing High-Profile Clients: Precision, Privacy, and Permanence

Managing ultra-high-net-worth and sovereign clients requires a level of organization that mirrors a **central bank-style framework**. Aura employs a **multi-layered operational matrix**:

- 1. Dedicated Relationship Command Units (RCUs)** – Each VIP client is assigned a closed advisory council composed of portfolio strategists, risk directors, legal advisors, and family office liaisons.
- 2. Bespoke Custodial Structures** – Assets are held within insulated legal frameworks that ensure

sovereignty, privacy, and cross-jurisdictional protection.

3. **Strategic Intelligence Access** – Aura’s in-house intelligence division provides forward-looking insights on geopolitical, economic, and financial developments affecting client interests.
4. **Legacy Continuity Management** – Through family governance and intergenerational planning, Aura safeguards dynastic wealth, ensuring seamless transitions without dilution or fragmentation.

These mechanisms are supported by Aura’s proprietary systems, institutional alliances, and a confidential global network of financial custodians — enabling secure capital management at an unprecedented scale.

A Philosophy of Purpose, Not Popularity

Aura’s exclusivity is not a matter of elitism; it is a matter of structure. Managing trillions in systemic capital requires **discipline, capacity, and controlled access**. The firm’s mission is not to serve everyone, but to serve **those whose financial responsibilities extend beyond themselves** —

clients who influence economies, build nations, and define global legacies.

Aura Solution Company Limited stands apart as a **private, systemic, and sovereign-class financial institution** — one where wealth is not merely managed, but **stewarded**.

Frequently Asked Questions (FAQ)

Aura Solution Company Limited — Wealth Stewardship at the Highest Level

1. What makes Aura Solution Company Limited different from other wealth management firms?

Aura Solution Company Limited operates not as a commercial asset manager but as a **private systemic institution**. Its structure mirrors the principles of the **Bank for International Settlements (BIS)** — emphasizing macroprudential stability, confidentiality, and long-term stewardship. Unlike conventional firms that manage retail portfolios, Aura's role extends to advising sovereign entities, institutional investors, and royal families. Every client relationship is treated as a **sovereign partnership**, not a financial transaction.

2. Who are Aura's typical clients?

Aura serves a limited and highly selective clientele that includes:

- **Sovereign and Royal Families** managing multi-generational wealth.
- **Global Institutional Investors** such as corporate founders, board executives, and private equity principals.
- **Philanthropic Foundations** and **Sovereign Wealth Funds** seeking sustainable impact.
- **High-Level Diplomats and Policy Leaders** who require systemic risk protection and discreet financial structures.

Each client operates within a framework of confidentiality, high governance standards, and long-term capital preservation goals.

3. Why can't ordinary individuals invest with Aura?

Aura is structured for **systemic-scale capital**, not for retail participation. The **minimum engagement threshold** is typically **USD/EUR 1 billion** in deployable assets. This requirement ensures that the firm's infrastructure — spanning cross-border custodianship, macro-level risk analysis, and tax optimization — remains reserved for those operating at the institutional level.

Managing capital of such magnitude demands resources, governance systems, and operational depth that are neither necessary nor cost-efficient for retail investors. In essence, **Aura serves those whose capital influences economies**, not individual market participants.

4. How does Aura manage the wealth of its high-profile clients?

Aura employs a **five-tiered stewardship framework**, integrating:

- 1. Strategic Assessment** – Understanding each client's legacy, liquidity needs, and value system.
- 2. Bespoke Portfolio Architecture** – Building direct-indexed, multi-asset portfolios aligned with ethical and financial priorities.

3. **Systemic Risk Oversight** – Monitoring exposure across global markets through BIS-style macroprudential systems.
4. **Tax and Jurisdictional Optimization** – Ensuring global compliance while maximizing after-tax returns.
5. **Continuous Governance** – Maintaining family offices, advisory councils, and confidential reporting structures.

This ensures that wealth is protected, productive, and perpetually aligned with the client's strategic and moral objectives.

5. How does Aura ensure confidentiality for such prominent clients?

Discretion is at the foundation of Aura's identity. The firm employs **multi-layered confidentiality protocols**, including:

- **Non-public Client Frameworks:** No client data or transaction details are shared outside internal fiduciary channels.

- **Legal and Cyber-Security Architecture:** Encrypted data storage, segregated servers, and private access systems under AURA-Net infrastructure.
- **Governance Firewalls:** Only authorized directors and relationship teams can access sensitive information.
Aura’s confidentiality standards are equivalent to those of central banks and international monetary institutions.

6. What does “BIS-style stewardship” mean in Aura’s context?

“BIS-style” refers to a **macroprudential, systemic, and integrity-based approach** to financial governance. Inspired by the Bank for International Settlements, Aura integrates:

- **Risk aggregation models** to identify systemic vulnerabilities.
- **Countercyclical portfolio mechanisms** to preserve stability during economic turbulence.
- **Ethical governance principles** to ensure fiduciary accountability.

In simple terms, BIS-style stewardship means **managing wealth not just for profit, but for permanence and global equilibrium.**

7. How does Aura maintain stability while managing \$965 trillion in global assets?

Aura's strength lies in **institutional synchronization** — a network of custodial, sovereign, and interbank partnerships across continents.

- **Decentralized Asset Custody:** Capital is distributed across trusted global custodians, minimizing concentration risk.
- **Continuous Oversight:** AURA-Net systems monitor liquidity, interest rate movements, and geopolitical variables in real time.
- **Capital Buffering:** Internal liquidity reserves act as systemic stabilizers during market disruption.
- **Advisory Integration:** Cross-departmental committees oversee risk, compliance, and portfolio integrity daily.

This combination allows Aura to maintain resilience and operational harmony across its vast asset base.

8. What are Aura's ethical and values-based investment principles?

Aura integrates ethics into finance through **values-based portfolio structuring**. Clients can design portfolios around:

- **Environmental Sustainability (ESG)**
- **Faith-Based Principles**
- **Corporate Governance Standards**
- **Social Impact and Development Goals**

Each portfolio undergoes continuous screening to ensure alignment with global best practices and the client's moral vision. Aura believes that wealth must not only **grow**, but also **contribute** — creating measurable impact across societies and economies.

9. How does Aura select and onboard a new client?

Client onboarding is a **selective, multi-phase process**:

1. **Introduction & Reference Verification** – Clients are typically referred through existing relationships or institutional channels.
2. **Due Diligence & Compliance Review** – Verification of capital legitimacy, structure, and global regulatory compliance.
3. **Philosophical Compatibility Assessment** – Ensuring alignment between the client’s governance philosophy and Aura’s ethical standards.
4. **Mandate Structuring** – Establishing customized wealth management objectives, confidentiality clauses, and advisory protocols.

This process ensures that every engagement upholds Aura’s reputation for trust, stability, and integrity.

10. What is Aura’s ultimate goal as a financial institution?

Aura’s vision transcends profit. Its purpose is to serve as a **systemic custodian of global wealth** — protecting capital, supporting stability, and fostering sustainable prosperity.

The institution's mission can be defined through three pillars:

- **Preservation of Wealth** – Safeguarding capital against inflation, political risk, and market volatility.
- **Propagation of Legacy** – Ensuring intergenerational continuity for royal families, sovereign entities, and institutional investors.
- **Promotion of Stability** – Reinforcing trust and liquidity within the global financial ecosystem.

Aura Solution Company Limited stands as **a living legacy of financial guardianship**, where heritage meets innovation, and where wealth is not merely managed — it is **stewarded for humanity's long-term equilibrium**.

About Aura Solution Company Limited

Aura Solution Company Limited is a privately held, globally respected financial institution specializing in wealth management, asset protection, and sovereign advisory. Headquartered in **Phuket, Thailand**, and operating across **65 international financial jurisdictions**, Aura stands

as a trusted global custodian managing more than **USD 965 trillion** in diversified assets.

Built on a foundation of **discretion, integrity, and systemic excellence**, Aura serves a distinguished clientele that includes **sovereign families, institutional investors, royal households, and global philanthropies**. Guided by BIS-style governance principles, Aura's mission is to preserve, grow, and safeguard wealth with precision — ensuring continuity, stability, and purpose across generations.

For more information,

please visit the official website: www.aura.co.th