



Information turned into strategy



Aldesa
Puesto de Bolsa

"The authorization to conduct public offering does not entail a qualification of issuance quality or issuer solvency." "Since these securities are registered at the primary market abroad, neither the issuer nor the issuances are under supervision from the Superintendencia General de Valores. Rather, they are supervised only by the regulatory agency in the original market." "Those values will be traded in foreign markets and under those markets' trading rules."

Aldesa Brokerage House

Aldesa Brokerage House is one of the longest standing institutions in the regional stock market. It was one of the founders of the National Stock Exchange, in 1976.

Since then, Aldesa Brokerage House has evolved and become a solid, trustable and experienced company in providing investment advice and managing international investment portfolios.

Our specialty

We specialize in consulting through design of investment strategies in global financial markets, in line with individual investors' goals and degree of risk tolerance.

The key to our consulting is creating customer service teams including market analysts, international and local market operators, and a stockbroker in charge of personally serving the account.

Our Services

We provide customers with effective, quick service based on top operating standards.

We implement strategy both locally, through brokerage operations conducted at the Costa Rican Stock Exchange, and internationally through our counterpart network in a number of countries.

We aim at attaining maximum benefit for our customers through objective investment recommendations based on sound technical criteria.

- Purchase and sale of local securities in the primary and secondary market.
- Individual investment portfolio management.
- Repurchase operations.
- Purchase and sale of corporate and sovereign bonds through our counterpart network.
- Distribution of local investment funds.
- Purchase and sale of foreign exchange.
- Currency hedging.

Individual Portfolio Management. Global reach

Individual portfolios are customized investment portfolios based on individual customers' risk diversification requirements. Risk diversification results from a number of different factors including maturity term, private/public issuer, currency, home country, and investment instruments.

Today's investors must participate in global markets with a fully-diversified asset base. Our 15-year experience in international markets enables us to assist you in building your investment portfolio.

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To start an individual portfolio, investors must instruct the brokerage house through a contract specifying portfolio makeup and degrees of freedom granted to the brokerage house for management purposes.

Foreign Exchange Purchase and Sale

Aldesa Puesto de Bolsa trades foreign exchange through the MONEX and FOEX platforms, operated by Banco Central de Costa Rica and the Costa Rican Stock Exchange, respectively.

Through these platforms you can trade foreign exchange at competitive prices with advice from Aldesa Puesto de Bolsa, the FOEX platform trade leader authorized by the Central Bank of Costa Rica.

Research and analysis

Careful research and analysis of information lead to appropriate investment decisions helping attain customers' goals. Thus, we turn information into strategy, in line with customers' objectives and risk profiles.

We complement our advice with:

- Economic update and general investment strategy guidelines lectures.
- Daily reports with investment recommendations at local and international markets.
- Weekly reports summarizing the factors shaping market trends.
- Monthly and quarterly reports on the global economy.
- Bimonthly reports on investment strategy general guidelines.

Risk Management

Supported by Aldesa's Corporate Risk Unit we have information to manage credit and market risk, both to advise customers and to manage investment portfolios. Our tools, especially those related to market risk, are key to design individual investors' strategies.

Our Consulting Model

We build individual investment portfolios step by step, in line with investors' needs, objectives, and investment terms.

1. Getting to know investors

Our priority is getting to know our investors. Our customers' confidence results from sound, objective advice based on:

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- Defining investment needs and goals.
- Finding out investment options.
- Submitting an investment proposal.

2. Advising

Investors' needs, as reflected in investment policy and market-related expectations, set the investment strategy including:

- In-depth analysis of economic and stock-exchange environment
- Choice of investment time horizon
- Creation of investment portfolio

3. Evaluating

Periodical review on investment strategy and policy is required due to changing economic conditions and investors' profiles. This entails:

- Assessment of portfolio performance
- Portfolio reallocation when required

Information to make better decisions

Our customers can check the status of their investments anytime they wish through our website. Using Aldesa en Línea, investors have access to:

- Information regarding their investment portfolio.
- Account statements of each of their investments (investment funds, assets in custody, alternative investments).