

# MONEX GROUP

## Announcement of Subsidiary's Release

TOKYO, November 20, 2017 – Monex-Saison-Vanguard Investment Partners, Inc., a subsidiary of Monex Group, Inc., and The Shizuoka Bank, Ltd. issued the following press release.

Monex Group, Inc. has been associated with The Shizuoka Bank, Ltd. in a capital and business alliance. This collaboration represents a part of the alliance.

Attachment: The Shizuoka Bank, Ltd. and Monex-Saison-Vanguard Investment Partners, Inc. press release

The Shizuoka Bank, Ltd. and Monex-Saison-Vanguard Investment Partners, Inc. reached a basic agreement on the introduction of Robo-advisors service with discretionary investment management

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(Referencial translation)

November 20, 2017

The Shizuoka Bank, Ltd.

Monex-Saison-Vanguard Investment Partners, Inc.

## The Shizuoka Bank, Ltd. and Monex-Saison-Vanguard Investment Partners, Inc. reached a basic agreement on the introduction of Robo-advisors service with discretionary investment management

This is to inform that The Shizuoka Bank, Ltd. (President, Hisashi Shibata) and Monex-Saison-Vanguard Investment Partners, Inc. (Representative Director Chairman and President, Tomoshige Nakamura) reached a basic agreement that Shizuoka Bank Group will introduce the discretionary investment management service.

### 1. Date of Execution

November 17, 2017

### 2. Background and Purpose of Agreement

- Monex-Saison-Vanguard Investment Partners, Inc. has launched a discretionary investment management service that uses Robo-advisors in September 2016, in aim to help individuals design a life plan based on their own values and life styles by thoroughly supporting clients to develop and achieve an asset management plan.
- Monex, Inc. has been offering the service above, and now Shizuoka Bank Group agreed on a plan to introduce the service targeting April 2018. This collaboration is a part of the capital and business alliance between The Shizuoka Bank, Ltd. and Monex Group, Inc., a parent company of Monex-Saison-Vanguard Investment Partners, Inc..
- Through offering this service, Shizuoka Bank Group and Monex-Saison-Vanguard Investment Partners, Inc. strive to support customers' long-term wealth creation and asset management and to satisfy much diverse needs of asset management by improving the quality of financial services.

### 3. Overview of Robo-advisors service with discretional investment management

- Asset management and asset control service: The Robo-advisors in the system makes an investment decision and executes transactions and consulting upon customers' selection of investment purpose, risk tolerance, capital amount and target amount and so on.
- This service has a concept of long-term and steady asset management that constantly conducts a follow-up of the investment and reconsiders the investment plan.

Overview of Monex-Saison-Vanguard Investment Partners, Inc.

Location	Zentoku Roppongi Building East 3F, 1-7-27 Roppongi, Minato-ku, Tokyo 106-0032, Japan
Established	August 2015
Capital	500 million yen
Representative	Representative Director Chairman and President Tomoshige Nakamura
Business Description	<ol style="list-style-type: none"><li>1. Operating Robo-advisors service with discretionary investment management, MSV LIFE, for individuals</li><li>2. Setting up and managing a private placement investment trust for institutional investors</li></ol>