



creating  
value across  
generations

**primus  
all weather  
trust**



PRIMUS ALL WEATHER TRUST IS AN ANGLO-SAXON TYPE  
ASSET PROTECTION UNIT TRUST MANAGED BY PRIMUS  
TRUST CORP. UNDER THE LAW OF HUNGARY AND THE  
PROTECTIVE SHELTER OF EU LAW.





**beyond  
reasonable  
doubt**

The Hungarian trust is an excellent asset protection vehicle, as none of the creditors of the settlor, trustee and beneficiary may have access to the trust assets. Hungary does NOT recognize US civil court judgments.

The creditor of the settlor MUST take legal action in Hungary against the settlor and the trustee, and MUST prove that the transfer of the trust asset was a fraudulent one.

The burden of proof lays on the creditor and the fraudulent transfer must be proven beyond reasonable doubt.

**Primus Trust Corp. has set up its own investment desk, where professionals develop Primus Trust's own investment strategy to support investment decisions.**

**Risk category:**

Low/moderate risk - Seeks higher yields than a risk-free yield and accepts losses in order to achieve higher profit. At the same time avoids transactions that may result in a significant loss of investments.

**Investment concept:**

Long only. Position leverage above total net asset value is not allowed.

**Benchmark Index:**

Equally weighted annual performance of \$GC (Gold futures continuous contract), \$ZN (10y US Treasury Note futures continuous contract), \$ES (E-mini SP500 Index futures continuous contract) and \$DBC ETF (Power Shares DB Commodity Index Tracking Fund).

**FX exposure:**

Open FX position risk is not allowed.

**Maximum portfolio exposure:**

Leverage not allowed – Total market value of all assets held by the Trust cannot exceed 100 % of the total net asset value.

**Maximum risk (stop loss value) on one single position:**

Direct position stop loss is not used.

**Maximum position limit:**

None of the trust's instruments market value may exceed 90 % of the total net asset value of the trust.



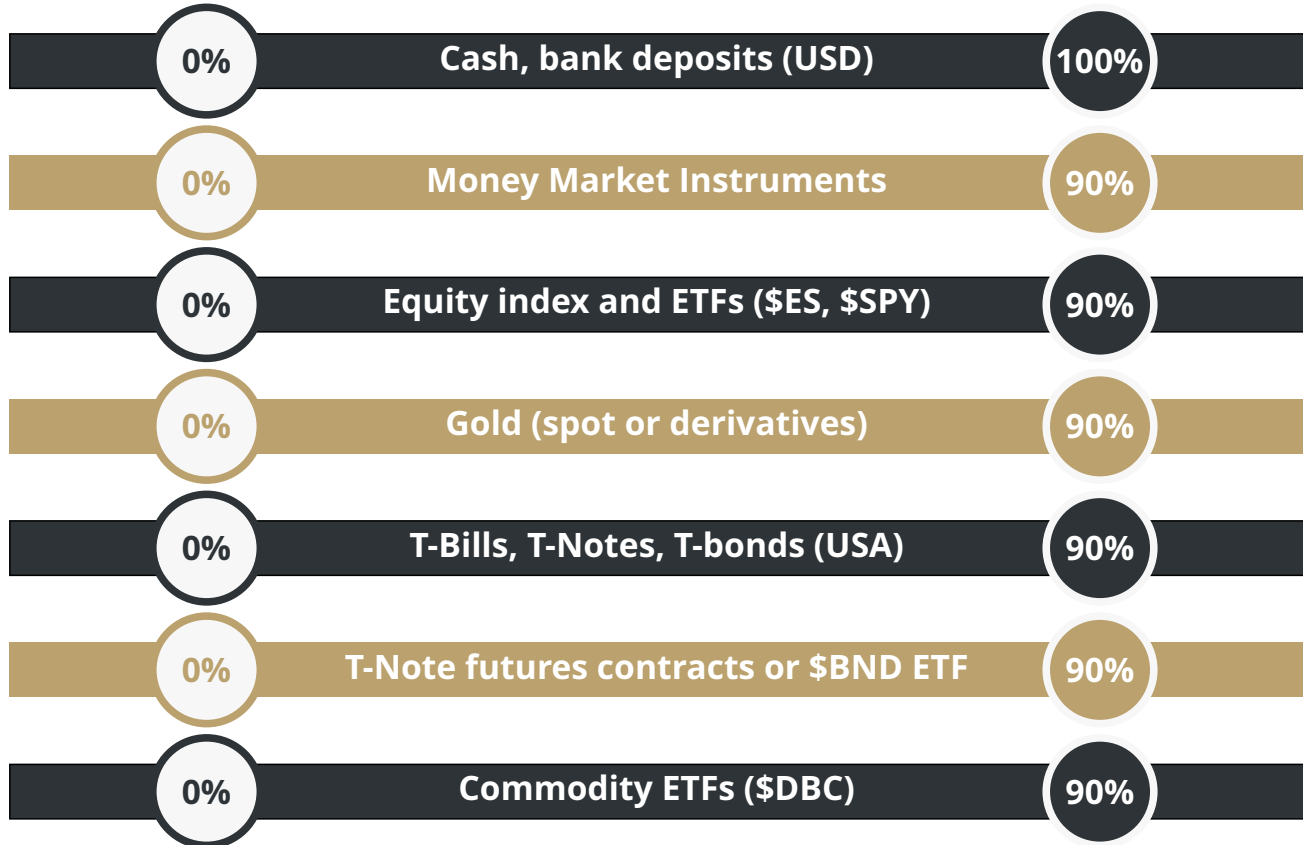
# applicable investment instruments

- Gold, in forms of: XAUUSD spot, \$GC (Gold futures contracts), \$GLD ETF (SPDR Gold Shares investment fund) units, or any derivatives of these instruments.
- S&P 500 equity index, in forms of: \$ES (E-mini S&P 500 index futures contracts), \$SPY ETF (SPDR S&P 500 ETF Trust) or any derivatives of these instruments.
- US 10 Year Treasury Note futures contracts and/or \$BND ETF (Vanguard Total Bond Market ETF) or any derivatives of these instruments.
- \$DBC ETF (Power Shares DB Commodity Index Tracking Fund).
- Money market instruments (loan and deposit deals).
- US Government Bills, Notes and Bonds.

# asset category

Minimum ratio

Maximum ratio





**Primus Trust Corp.,  
as a responsible  
trustee, provides  
comfort to its  
customers in the  
form of a financial  
guaranty of  
EUR 5 million.**

**Our indemnity  
insurance has  
been issued by  
the UK based  
Lloyds Syndicate.**

# highlights of primus all weather trust

- No dual ownership concept
- Strict fiduciary duties
- The trustee is subject to a duty of confidence
- Licensed trustee
- The trustee is a NON-US person
- The corporate protector is a NON-US person
- Tax neutral treatment
- Tax compliance
- Tax free asset transfer
- Segregated bank and security accounts for the trust in the EU
- No publicly available information about the settlors and beneficiaries
- Monthly financial reports to the costumers

	US domestic Trust	Hungarian Trust	Cook Islands Trust	Nevis Trust
Dual ownership	✓	✗	✓	✓
EU law protection	✗	✓	✗	✗
Access to Investment Protection & Double Taxation Treaties	✗	✓	✗	✗
Recognition of US civil judgments	✓	✗	✗	✗
Economic substance	✓	✓	✗	✗
Local banking	✓	✓	✗	✗
In house investment desk	✗	✓	✗	✗
Indemnity insurance	✓	✓	✗	✗
Publicly accessible records	✗	✗	✗	✗
Look through US tax approach	✓	✓	✓	✓
Burden of proof - beyond reasonable doubt	✗	✓	✓	✓

# contact us

1023 Budapest, Szepvolgyi ut 6., Hungary  
www.primustrust.hu



**Dr. Ákos Menyhei**

*managing partner*

menyhei.akos@primustrust.hu

+36 20 971 6668



**Dr. Gábor B. Szabó**

*managing partner*

bszabo.gabor@primustrust.hu

+36 30 922 0164



**Dávid Pálmai-Pallag**

*managing partner*

ppd@primustrust.hu

+36 70 421 3633

## DISCLAIMER:

This information like brochure has been prepared as a document for reference and illustrative purposes only. It is not, and should not be considered as "investment advice" or as a "recommendation" regarding a course of action to buy or sell any financial instruments, or to make any investment decision. The whole content of this document reflects the author(s) personal views, which may influence decisions made by Primus Trust Corp. when investing its own assets. The content of this document is not a market research, or investment analysis of any kind. Further consultation with Primus Trust Corp.'s experts is strongly recommended before any decision generated by the present brochure.

