

INFIDAR

INVESTMENT ADVISORY – SINCE 1954

YOUR NEEDS
OUR SERVICES
YOUR BENEFITS

WE CULTIVATE WHAT YOU BUILD.

OUR SERVICES



PORTFOLIO MANAGEMENT

Portfolio Management according to the jointly defined investment strategy

INVESTMENT ADVISORY

Professional advice on the implementation of your own investment strategy

ASSET CONSOLIDATION

Consolidated Asset Reporting
Investment Controlling and Monitoring

ADDITIONAL ADVISORY SERVICES

Advice on the definition of investment strategies
Advice on the selection of asset managers

Related services

We assist you in the selection of your custodian bank.

We assist you in the selection of specialists in areas such as real estate, estate planning, philanthropy, tax and legal, change of domicile.

PORTFOLIO MANAGEMENT

YOUR NEEDS

You want your assets to be professionally managed according to your personal objectives, without you having to be involved in the day-to-day selection and execution process.

OUR SERVICES

- > Together with you we define an investment strategy.
The selection of the appropriate investment strategy is the result of a structured and analytical process, taking into consideration your personal situation (e.g. family situation, living costs, personal goals, personal needs and investment horizon, your risk capacity and risk tolerance).
- > We apply a structured investment process for the management of your assets. It contains, among others, the following elements:
 - Collection and assessment of research material from different banks and brokers
 - Development and simulation of forecasts and scenarios
 - Support by chart-technical information and analyses
 - The asset allocation is then defined and formulated by our independent investment committee (top-down).
- > We are responsible for the implementation of the investment strategy and the selection of the appropriate instruments (bottom-up).
- > We are completely independent and may thus select the appropriate products. We are under no obligation to use any specific provider. We may buy any investment product in any currency worldwide.
- > We inform you regularly about the development of your assets, if required, also on a consolidated basis.
- > Our internal control process assures that your assets are invested according to the defined investment strategy.

YOUR BENEFITS

- > Our specialists continuously monitor the markets as well as political and economic developments around the globe.
- > By signing a portfolio management agreement with us, you allow us to take the day-to-day decisions for you.
- > Our regular updates enable you to maintain a comprehensive overview of the development of your assets.

INVESTMENT ADVISORY

YOUR NEEDS

You prefer making your own investment decisions. You want to be informed regularly about market and economic developments. You want independent advice and professional expertise. You expect your investment adviser to take all aspects of your personal situation into consideration.

OUR SERVICES

- > We advise you within the parameters of the jointly defined investment strategy in the following fields:
 - Asset classes
 - Regions and currencies
 - Specific investment instruments
- > We monitor your liquidity and the maturities of fixed-income instruments as well as the development of your investments.
- > We prepare investment proposals.
- > You decide on the frequency of our contact. In case of extraordinary events, we will contact you proactively.
- > We inform you regularly about the development of your assets, if required, also on a consolidated basis.

YOUR BENEFITS

- > You receive independent and professional advice on the management of your wealth and investments.
- > You make your own investment decisions.
- > We keep you informed about market and economic developments.

ASSET CONSOLIDATION

Consolidated Asset Reporting

Investment Controlling and Monitoring

YOUR NEEDS

You wish to have an overview of all your accounts with various banks in a consolidated report.

You wish to have an overview of all your accounts with various banks in a consolidated report. In addition, you want an independent review of their activities.

OUR SERVICES

- > Consolidation of various portfolios
- > Possibility to integrate non-bankable assets
- > Content of the reporting:
 - A consolidated view of asset classes, regions and currencies
 - Consolidated performance
 - Risk/return analyses
 - Maturity overview
 - Benchmark analysis
 - Detailed list of investments
 - Transaction report

- > Consolidated Asset Reporting
- > Additional services:
 - Qualitative analysis and review of performance of each asset manager, taking into account the defined investment strategies and your individual restrictions
 - Critical review of transaction executions as well as fees and charges
 - Periodic summary of results
 - Market outlook

YOUR BENEFITS

- > Transparent summary of all your assets
- > Valuable instrument to systematically monitor and manage assets which are booked with various banks

- > Transparent summary of all your assets
- > Valuable instrument for a target-orientated and comprehensive wealth management controlling
- > Independent analysis of performance contribution of each asset manager
- > Market outlook

ADDITIONAL ADVISORY SERVICES

Advice on the definition of investment strategies

Advice on the selection of asset managers

YOUR NEEDS

You require professional assistance to define your personal investment strategy.

You require neutral and professional advice as well as support in the selection of asset managers who are mandated to manage your assets.

OUR SERVICES

- > We advise you on the definition of your investment strategy, taking your individual requirements into consideration (e.g. investment objectives, risk capacity and risk tolerance, investment horizon).
- > If required, we advise you on the application of overlay instruments (e.g. forward foreign exchange transactions, futures).
- > Periodic review of investment strategy
- > We support and advise you on the selection of asset managers.
- > We prepare a list of asset managers meeting your individual requirements.
- > We organise presentations with potential asset managers in which they present their investment style and implementation approach.
- > We support you in the selection process.

YOUR BENEFITS

- > You receive an investment strategy tailored to your individual needs.
- > You receive our professional support in the selection of asset managers.
- > You find your ideal asset manager.

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