

«Dynamic» investor type

Our solutions for the dynamic investor. A comprehensive service or as part of your overall strategy.

We offer you:

Asset management

Are you looking for an active wealth manager that focuses exclusively on investing your assets? Based on your specifications, we will tailor our wealth management services to your individual needs. As a FINMA-regulated manager of collective investment schemes, we also manage occupational pension assets, including vested benefits capital, non-mandatory occupational «1e» assets and pillar 3 assets.

We take care of all your investment decisions.

Investment advisory «Active Advisory»

Are you interested in developments on the financial markets and keen to play an active role in investment decisions but grateful for the advice of a proven specialist? We help you to invest your assets in line with your preferences.

We advise – you decide!

Heinz
Zimmermann
—
CEO

„We foster long-term client relationships through continuity in our service.“

Multi-asset strategies

IFS Balanced

- Investment approach derived from our successful investment strategy that has been in place for many years.
- Investment fund under Swiss law that complies with the Swiss Occupational Pensions Act (OPA) and Occupational Pensions Ordinance (OP02).
- Multi-asset strategy combining a balanced investment strategy and an active investment approach (regulating the equity weighting between 0 and 50 per cent).

Equity strategies

IFS Swiss Equity

- Strategy in the form of an investment fund under Swiss law.
- The investment manager pursues an active approach focusing on small and mid caps in Switzerland and is able to outperform the benchmark over the long term.

IFS Systematic US Momentum

(Liechtenstein-based UCITS fund)

- Stockpicking is based on a momentum approach devised in house.
- Academic studies have demonstrated on a sustainable basis that momentum strategies enable a portfolio to outperform the rest of the market over the long term.
- Our approach also contains elements of active risk control, which allow the overall exposure to be reduced during sizeable corrections.

IFS Risk Managed Global Strategy

(Liechtenstein-based UCITS fund)

- An efficient and low-cost way to participate in a global equity portfolio with integrated risk management.
- Its active risk control is based on signals from hand-picked quant specialists. These signals are selected and monitored in cooperation with our Swiss-based partner Sanostro Ltd.
- Risk control reduces losses during sizeable market corrections, thus boosting risk capacity. This in turn enables greater benefits to be leveraged from the equity markets when they begin to rise again, generating long-term added value on a risk-adjusted basis.

IFS Best of Guru

(Actively managed certificate together with UBS Inc.)

- We launched the IFS Best of Guru Equities Europe Basket in partnership with the research firm meetinvest AG.
- In meetinvest.com, meetinvest AG has developed an online platform that makes the investment strategies of 30 market experts available as quantitative filters.
- We have picked five of these strategies and given them equal weighting in a portfolio.

Private-market strategies

Daneo Mezzanine Fund

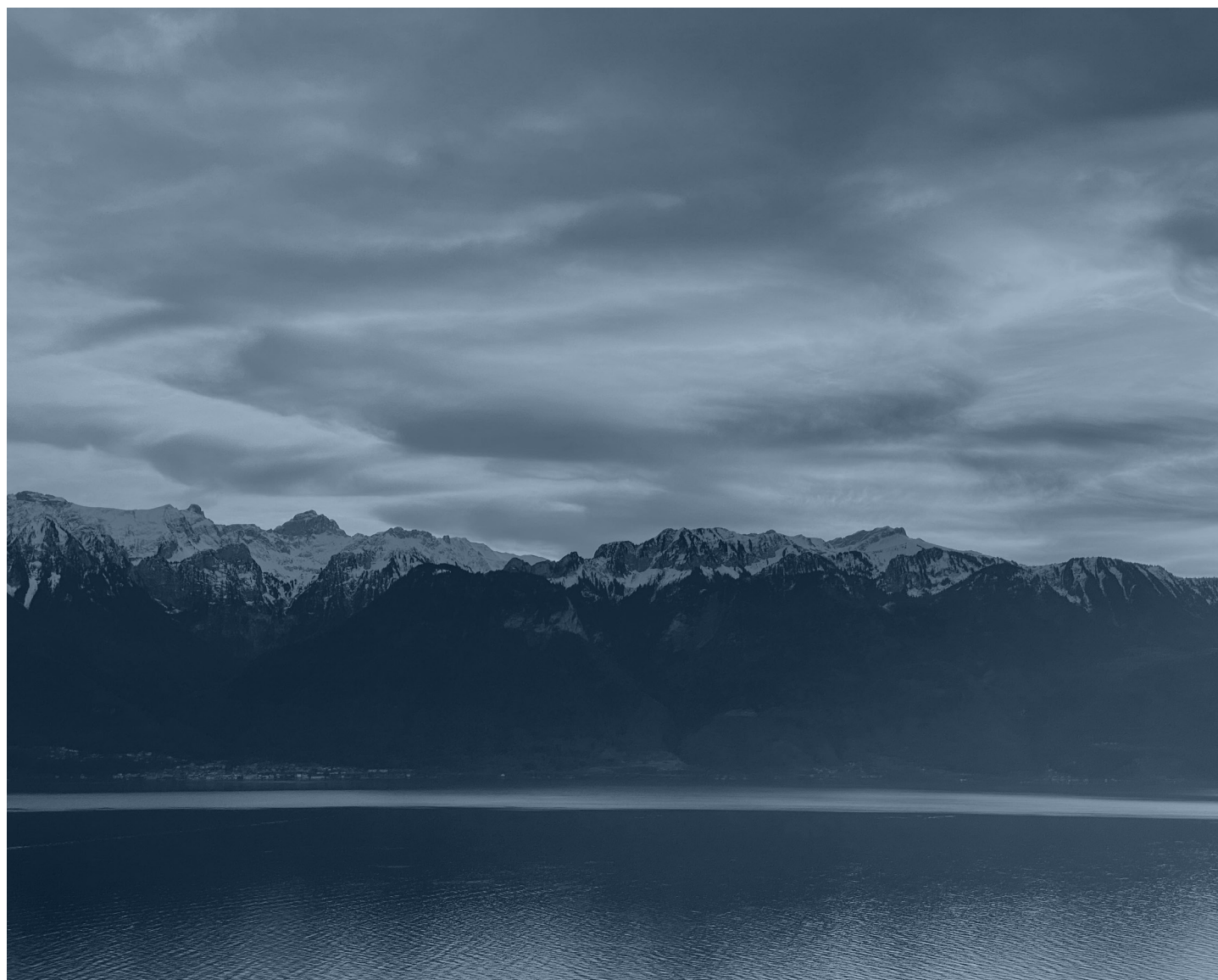
(Liechtenstein-based alternative investment fund (AIF))

- The fund grants or invests in mezzanine financing for (commercial and residential) real estate projects.
- In geographical terms, the fund focuses on financing in German-speaking Europe.

Daneo Private Debt Fund I

(Liechtenstein-based alternative investment fund (AIF))

- The fund invests in private-market loan finance, focusing on Germany, Austria and Switzerland.
- All manner of different financing situations are covered, including debtor and growth finance.
- Collateral for the financing and its ranking in the capital structure are important factors in picking the loans.



Your specialists



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Contact us for a one-to-one
conversation.