

CREATING PERFORMANCE



ABOUT SYZ

We are a Swiss banking group specialised in investment management. Founded in Geneva in 1996, our family shareholder structure guarantees our independence and strength.

Our objective is simple – to offer the best investment and wealth management solutions to our clients.

Two words sum up our purpose:
“CREATING PERFORMANCE”

OUR AREAS OF EXPERTISE

The SYZ Group offers private and institutional clients innovative, best-in-class investment and wealth management solutions based on strong convictions and expertise within a range of asset classes.



PRIVATE BANKING

SYZ Private Banking has offered a new approach to private wealth management for over 20 years, bringing together the advantages of traditional private banking with the rigor of institutional asset management.

Our private banking services are accessible in many jurisdictions with a full suite of investment solutions: discretionary management, advisory and specialised alternative strategies.

Our service-oriented approach contributes to our success. Each client is unique and deserves customised solutions.

ASSET MANAGEMENT

SYZ Asset Management has provided clients with value-added strategies through active management for more than two decades.

We offer a number of specialised strategies for investors seeking truly actively-managed solutions. Our strategies are available through both funds and customised mandates.

PRIVATE MARKETS

Private Markets can provide diversification to any investment portfolio. At SYZ, our open architecture approach lets us deliver the very best solutions to meet our clients' investment objectives transparently and through an alignment of interests.

Our Private Markets team offers clients privileged access to best-in-class managers, as well as direct investment opportunities and corporate advisory.



INDEPENDENT MANAGERS

Our dedicated team is a preferred partner for independent managers both in Switzerland and internationally. Our clients benefit from our experience, customised service and exclusive access to services from across the SYZ Group.

From custody to administration to reporting, our team offers a flexible and broad offering to meet the needs of all types of clients.



IN ENTREPRENEURIAL IDEAS WE TRUST

ENTREPRENEURIAL SPIRIT

Since our creation as a next-generation bank, an entrepreneurial spirit remains at the heart of the SYZ Group. We look towards the future and are dedicated to helping our clients achieve their diverse goals.

BOLD

Since 1996 the SYZ Group has challenged peers through an innovative business model designed to align our bank's objectives with our clients' by offering a performance-based fee model.

RESULTS

Our focus has always been performance. Every single day this drives everything we do and fuels our constant drive to improve.

Our long-standing commitment to delivering superior performance for our clients has allowed us to grow quickly, making us a key player in the Swiss financial services industry.



IN INNOVATION WE TRUST

VISION OF THE FUTURE

We are a dynamic bank, rich in the centuries-old traditions of the Swiss financial services industry. Since our creation, we have constantly innovated to anticipate the needs of our clients and offer them attractive wealth management and investment opportunities while delivering excellent service.

LEADING-EDGE TECHNOLOGY

We believe our clients are best served when we invest in our staff and our technological solutions. Our clients are always at the heart of the business.



**IN PERFORMANCE
WE TRUST**

CLEAR OBJECTIVE

The best way to reach a goal is through precise targets and a solid process. Experts across our business listen carefully to the concerns and objectives of our clients and then act decisively to deliver.

RISK MANAGEMENT

Our objective is to provide attractive returns relative to the level of risk our clients are willing to take.

To provide this, our Discretionary Management Service has developed an innovative investment process based on respecting our clients' pre-defined, and evolving, risk budgets.

DEDICATED SPECIALISTS

Expertise and excellence are born from specialised knowledge. This is why our resources are concentrated on managing assets.

We have developed a strong investment environment that fosters skills and attracts leading talent.

Our disciplined, time-tested approach provides transparent and repeatable results for our clients.



RECOGNISED EXPERTISE

Our experts are our greatest asset. They are at the heart of all our actions and the main driver of our success. We appreciate this wealth of knowledge and protect our human capital by promoting an environment of collective intelligence and skills development across the bank.

SERVICE-ORIENTED CULTURE

The quality of our services is paramount and based on an understanding of our clients' needs. Because each client is unique, understanding their concerns and goals is key. Together we define objectives and risk profiles before offering sustainable investment and wealth management solutions.

Our success is based on the trust that our clients place in us daily. They are our greatest ambassadors.



**IN TALENT
WE TRUST**

CONVICTIONS

Strong performance over the long-term is not a coincidence.

Attractive returns through active management, guided by convictions, are both central to the investment process.

Rather than follow the crowd, our investment managers rely on their talents and experience to find their own active management path to success.

FUNDAMENTAL RESEARCH

Our approach allows us to identify attractive opportunities, regardless of market conditions. As pure active managers, our investment teams forge their convictions by relying on time-tested, rigorous research methodologies based on fundamental analysis. One of the pillars of our research process is our relentless focus on downside risk.



INVESTMENT CULTURE

To attract the best specialists and give them the opportunity to thrive, we have created a stimulating framework in a strong investment culture.

Our experts are given the flexibility to demonstrate their talent, collaborate with peers and contribute to the innovation that drives future investment opportunities for our clients.

MULTI-CULTURAL ENVIRONMENT

The SYZ Group benefits from a rich blend of cultures, experience, skills and diverse opinions all of which contribute to a stimulating environment.

Our staff bring proven experience across a wide range of asset classes and strategies, countries and currencies.

Our strength is not only in our diversity, but also in our shared objective of delivering best-in-class investments for our clients.





IN OUR STRENGTHS WE TRUST

ROBUSTNESS

Solidity guarantees trust. This makes the SYZ Group a preferred partner.

With our focus on wealth management, SYZ does not engage in risky activities such as commercial credit, project financing or investment banking. The Group also benefits from a high level of equity and a family shareholder structure that provides a solid financial footing.

DISTINCTIONS

Private and institutional investors recognise the attractiveness of our business model. Year after year we have been recognised for the quality and depth of our value proposition, and our exponential growth underlines our accomplishments to date.

But in the end, our clients' satisfaction is our true measure of success.

INDEPENDENCE

Thanks to our family structure, we are free from external pressures and able to think long-term. Our investment and asset management recommendations are dictated exclusively by our own convictions and focused on delivering our clients' objectives.



FLEXIBILITY

Markets don't stand still and neither do we. Our flat and agile organisation lets us respond quickly to changes in market conditions or shifts in our clients' objectives and needs.

OPEN MINDED

We pride ourselves on our open-minded nature and our ability to think "outside of the box". We look for unique investment opportunities around the world and strive to generate returns in innovative ways.

IN LONGEVITY WE TRUST



ENTREPRENEURIAL SPIRIT

Create, Innovate and Manage are the main objectives that have driven the Syz family for generations. Eric Syz used his own, as well as his family's banking experience, to establish the SYZ Group in 1996. A visionary entrepreneur, he built SYZ into a key player in the Swiss financial services industry. In the same spirit his sons, Marc and Nicolas Syz, play leading roles in the company and share identical values.

SYZGROUP.COM

Photos: Fred Merz
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This brochure is illustrated with photos of Banque SYZ's headquarters in Geneva. The artworks shown are from the private collection of Suzanne and Eric Syz. More information can be found at thesyzcollection.com

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