



EST. 1804

### Long-standing expertise & diversified

Established in 1804, Schroders has over 216 years' experience with investing through a wide range of market environments. At the same time, it is the most diversified UK-listed asset manager by asset class, geography and client type.



### Global & local

Operating in 37 locations across Europe, the Americas, Asia, Middle East and Africa, Schroders has an extensive global network of 60 investment teams, providing local market expertise. Schroders employs over 5500 talented and specialised employees.



### Responsible for CHF 694 bn

We have responsibility for CHF 694 bn on behalf of institutional and retail investors, financial institutions and high net worth clients from around the world, invested across equities, fixed income, multi-asset, private assets and alternatives. The firm's assets under management have increased by 300% in the last 10 years.



### Solid foundation & financial strength

Schroders has had a stable ownership since its inception in 1804: the Schroder founding family controls 47% of the voting shares. The firm is well known for its financial strength, having one of the strongest balance sheets in its sector. Schroders has about CHF 1.1 billion surplus capital for building the business.



### Strategic capabilities

Our business is built around strategic capabilities to meet the needs of our clients, be that consistent income, growing investment returns or investing in a way that helps society and respects the environment. Schroders has a proven track-record as competent steward of investors' savings.



### Sustainability ESG

Schroders combines its specialist sustainability insights with world-class traditional investment expertise, aiming to deliver better outcomes for clients and society as a whole. The firm's proprietary ESG analysis tool, Sustainex, helps to understand the risks and opportunities of environmental and social change and to identify sustainably managed businesses.

# Schroders strategic focus

Combining our commitment to active management and focus on sustainability, our strategic capabilities are designed to deliver positive outcomes for our clients.

## Private Assets

Accessing specialist investment opportunities available in private markets, such as real estate, private equity and infrastructure.

- 3 important lines of business are based in CH: Private Equity, Insurance-Linked Securities, Real Estate

## Multi-Asset

Helping build better outcomes.

## Emerging Markets

Helping capture emerging market growth with confidence.

## Solutions

Increasing investment certainty, intelligently. Provision of complete solutions and partnerships, including liability offsets and risk mitigation.

## Alpha Equity

Targeting higher active equity returns.

## Alternatives

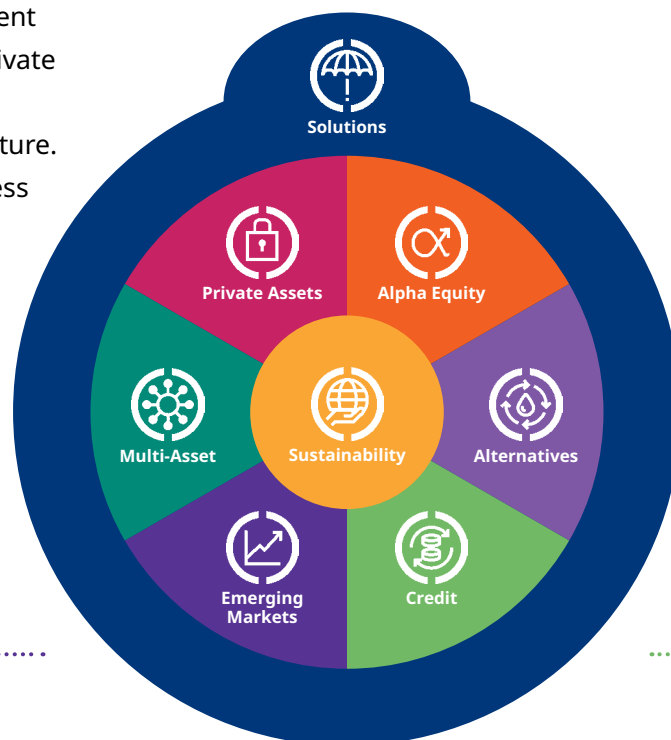
Diversifying beyond traditional asset classes.

## Credit

Intelligently crafted fixed income solutions.

## Sustainability

- Sustainably delivering long-term value in a fast-changing world.
- 20+ years of ESG integration
- 17 dedicated ESG specialists
- 2150 engagements in 2020
- Schroders supports the United Nations sustainable development goals (SDGs)
- achieved 100% ESG integration across our managed assets at the end of 2020



# Investment desks in Switzerland

## Zurich based portfolio management

### Private Equity

Head | Rainer Ender

- with Schroders for 4 years, having been with Adveq Holding for 18 years
- 21 years finance industry experience
- 100% focus on private equity
- Global investment strategy targeted at specialised investment opportunities
- Strong absolute and relative performance

### Insurance-Linked Securities (ILS)

Head | Stephan Ruoff

- with Schroders for 2 years
- 25 years of finance industry experience, mostly in (re-)insurance
- Great diversification – an independent and pure risk premium
- ILS are very low duration fixed income
- Fairly compensated asset class

### Swiss & European Equities

Head | Stefan Frischknecht

- with Schroders for 22 years
- 27 years finance industry experience
- Invest as long-term shareholders through a proven process
- Convincing track record for the past 16 years
- Expert team for small & mid caps; outstanding team stability

### Investment Wealth Management

Head | Giovanni Leonardo

- with Schroders for 6 years
- 26 years finance industry experience
- Discretionary mandates
- Advisory mandates
- Private Equity – co-investments for private clients & private equity support for family offices

### BlueOrchard

CEO | Philipp Müller

- with BlueOrchard for over 3 years
- 16 years finance industry experience
- Pioneer in microfinance and impact investing with proven 20 year track record
- Manager of world's first and largest commercial microfinance fund, offering impact investment solutions across asset classes
- Experienced investment team with local presence in emerging and frontier markets

### Real Estate

Head | Roger Hennig

- with Schroders for 12 years
- 26 years finance industry experience
- Attractive direct commercial real estate portfolios in Switzerland and Europe
- Long-term management with convincing track record
- Experienced investment and asset management teams with local presence

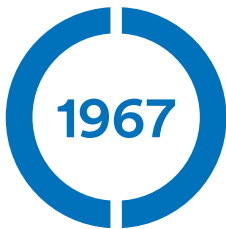
### Convertible Bonds

Head | Peter Reinmuth

- with Schroders for 7 years
- 25 years finance industry experience
- Downside protection is the first rule for wealth preservation
- Long-established and proven track record
- Highly dedicated and experienced investment team

# Schroders in Switzerland

At home in Switzerland for over half a century – here we have three businesses; each with its own emphasis, all with the same clear focus on meeting clients' needs and adapting to a changing world.



operating  
in Switzerland



employees



billion CHF  
administered and  
cumulated assets



commitment to  
Swiss financial  
marketplace

## Schroder Investment Management (Switzerland) AG

offers institutional and private investors a wide range of Swiss-domestic and foreign-domiciled funds, along with bespoke investment mandates. Insurance Linked Securities are also a key component of Schroders product offering in Switzerland.

### Andreas Markwalder, CEO

- with Schroders for 4 years
- 20 years of finance industry experience

## Schroder & Co Bank AG

provides bespoke Wealth Management services to private individuals, family offices, external asset managers and charities.

As a specialised Swiss Private Bank with high capitalisation, Schroder & Co Bank focus solely on the safe-keeping & on growing its clients' wealth.

### Adrian Nösberger, CEO

- with Schroders for 7 years
- 20 years of finance industry experience

## Schroder Adveq Management AG

is a leading private equity asset manager serving institutional investors, namely pension funds and insurance companies globally, providing access to select private market segments through primary, secondary and direct/co-investments.

### Rainer Ender, Head of Private Equity

- with Schroders for 4 years, having been with Adveq Holding for 18 years
- 21 years finance industry experience

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## Schroders Switzerland

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