



An introduction to Investec Bank (Switzerland) AG



Out of the Ordinary



Introducing the Investec Group

Investec is an international specialist bank and asset manager that provides a diverse range of financial products and services to a niche client base. Our focus is to deliver distinctive and profitable solutions for our clients in three core areas of activity – Asset Management, Wealth & Investment and Specialist Banking.

Our strategic goals and objectives are based on our aim to be recognised as a distinctive specialist bank and asset manager, that thinks out of the ordinary. This distinction is embodied in our entrepreneurial culture, which is balanced by a strong risk management discipline, client centric approach and the ability to be nimble, flexible and innovative.

Rather than being all things to all people we aim to provide an effective, well-defined service to select market niches.



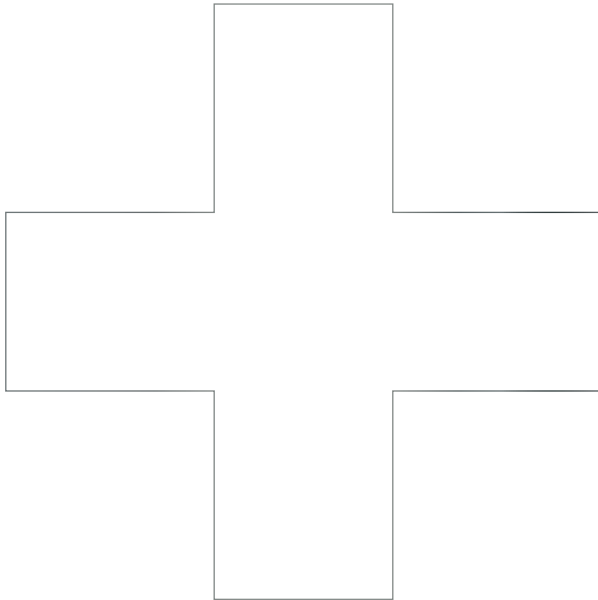


Investec Wealth & Investment

Investec Wealth & Investment has a heritage dating back to 1827, but our eyes are firmly set on the future. We now manage more than CHF 60 billion worldwide on behalf of our clients. The depth and breadth of Investec enables us to offer an expansive service to our clients and gives us access to an extensive pool of investment opportunities around the world.

Our investment management philosophy is international, allowing us to construct global multi-asset portfolios to suit the requirements of our clients based on their investment objectives. We cater to a diverse range of clients, from private individuals to corporate structures, trusts, charities, foundations and financial intermediaries.





Why Switzerland

- AAA jurisdiction
- Strong regulation
- A stable and strong independent currency
- Well qualified, multi-lingual workforce
- Effective infrastructure, as a result of our set up as a 'universal bank' where clients can have access to investment, broking, custody and banking services (foreign exchange, payments and lending) from one single source and operated through one account
- Not within the Eurozone
- Highly rated wealth management and financial centre
- Leading jurisdiction for off-shore wealth management
- Economic and political stability
- Safe haven



Introducing Investec Bank (Switzerland) AG

Drawing on our unique Swiss banking heritage and leveraging off Investec Group's resources and investment processes, we are able to deliver truly innovative global wealth management and banking solutions to our clients. Our boutique approach ensures that we are correctly positioned to out-think, not out-muscle the competition, which explains why our offering remains attractive to a broad base of international and local clients.





Our offering

Standard services available in all our portfolios:

- Full execution and custody of all asset classes
- Multiple currency accounts available
- Third party international payments
- Credit/Debit cards
- Foreign exchange dealing
- Lombard loans
- Derivatives
- Exotic securities (Private Equity, GDRs)
- Online access



Client Controlled Portfolios

In addition to the standard offering, all our clients enjoy personalised service from a dedicated relationship manager.

Advisory Portfolios

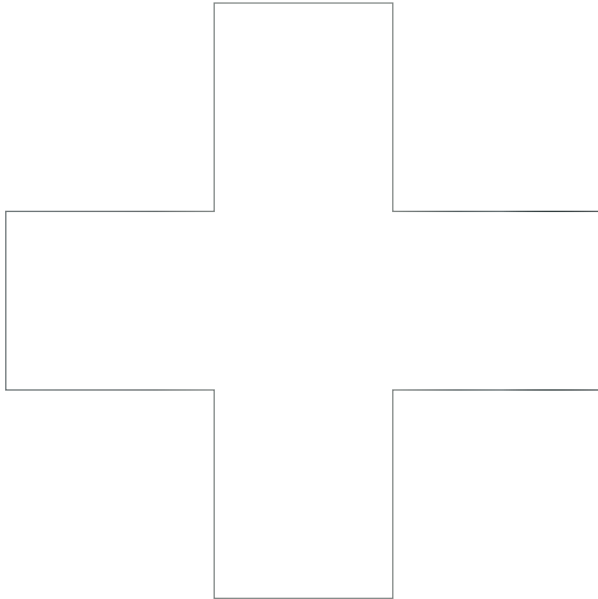
Clients are provided with investment solutions/ideas based on their risk profile on a consultancy basis, by their dedicated relationship manager.

Discretionary Portfolios

A full range of discretionary solutions available depending on our clients needs and risk appetite and managed by a dedicated portfolio manager.



“We differentiate ourselves by offering a comprehensive and integrated service focusing on long-term relationships and founded on research excellence backed by strong execution.”



Discretionary management

Whether you are seeking advice or a discretionary service, we start with a blank piece of paper to establish the best way to provide you with an investment plan that best meets your objectives, while understanding the amount of risk you are willing to take to achieve them.

By understanding your investment needs, and supported by high quality asset allocation and in-depth research, our well-resourced and experienced team of investment professionals are dedicated to managing your investments to meet your requirements.

At the heart of our investment process lies a rigorous and disciplined approach to asset allocation. Our approach is based on fundamental analysis of long-term trends in economies, financial markets and our observation of the returns from the major asset classes.



Wealth structuring

Through our well established strategy of working with Swiss-based trust companies, we can provide our clients with structuring solutions, if desired, and thereby facilitate a complete wealth planning solution.



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