

Geneva, 24 July 2024

Dear Asset Managers,

A few years ago, when I was beginning my career as a business consultant, I incidentally received a request from a major international bank that caught all my attention. The senior manager I was talking to explained that his bank was looking for an innovative portfolio management system (PMS) to implement. We discussed at length the necessary specifications in terms of technology and the type of management to be implemented.

Then, I studied the market in depth to be able to respond to this demand and concluded that the ideal PMS existed but was scattered between several independent software companies.

I contacted these companies and, from meeting to meeting, we concluded the necessary agreements to start a partnership. We met in 2021, in Zurich, for our first plenary session, and decided to move forward together towards the creation of a consortium to develop and deliver the requested service.

In the meantime, several independent asset managers and bankers have also expressed an interest in our system. On the technological side, the algorithm underlying our software has evolved considerably. Artificial intelligence, in particular artificial neural networks and natural language processing, now offers numerous possibilities for commercial development of our product model.

Our solution is currently used by thirteen banks, five non-bank asset management companies, several pension funds and private individuals.

To achieve our objectives, we are interested in forming a partnership with your asset management company, to put the skills of our consortium at the service of your clients' acquisition strategy, and thus enable more users of our ecosystem to benefit from your advisory and management expertise.

In these times of increased competition and unprecedented change in the wealth management industry and the financial sector in general, a partnership with our consortium can offer you a unique opportunity to remain competitive, adapt smoothly to the changing market conditions and anticipate your clients' growing investment needs and requirements.

Yours sincerely
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