



MAERKI BAUMANN & CO. AG

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## MEDIA RELEASE

### **Maerki Baumann & Co. AG embarks on joint venture with Globalance Bank and strengthens its offering in the area of sustainable investments**

**Zurich, 1 July 2020 – Maerki Baumann has entered into a joint venture with Globalance Bank in the area of sustainable investments. Owner-managed Globalance, which is headquartered in Zurich, is a pioneer in the field of sustainable asset management. The collaboration will initially comprise the offering of the new “Equities Global Impact” focus module, which is integrated into Maerki Baumann’s innovative modular investment solution. In a second step the investment process will be geared towards the future by systematically addressing client needs and requirements in the environment, social and governance (ESG) area.**

With the launch of its new “Equities Global Impact” focus module, Maerki Baumann is taking account of its clients’ increasing wish to have a positive impact on the environment and society in addition to generating a financial return. In many client segments there is growing awareness of the need to deploy capital in a thoughtful way. In Switzerland, sustainable investments reached a new peak in 2019 with a volume of CHF 1,163 billion. The increasing interest in sustainably invested assets shown by both private and institutional investors looks set to continue.

For many years now, Maerki Baumann has been offering an innovative asset management solution that is tailored to the individual needs of private and institutional clients: The bank’s modular investment solution consists of numerous investment modules that can be flexibly combined in keeping with the client’s preferences ([www.maerki-baumann.ch/modular-investments](http://www.maerki-baumann.ch/modular-investments)). This service offering enables the client to tap into Maerki Baumann’s investment expertise while at the same time retaining a strong say in the choice of investments. For example, individual preferences can be reflected in the client's choice of markets, asset classes and risk levels.

#### **Joining forces with a pioneer in sustainable asset management**

For managing the “Equities Global Impact” focus module, we can count on the expertise of Globalance Bank. This Zurich-based company, which specializes in future-related themes, is considered a pioneer in the area of sustainable asset management ([www.globalance-bank.com](http://www.globalance-bank.com)). The “Globalance Footprint®” methodology developed by Globalance differs fundamentally from backward-looking methods of analysis. When analysing companies, particular importance is attached to innovative strength and future viability.



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Dr Stephan A. Zwahlen, Chief Executive Officer of Maerki Baumann, is excited by the potential of this joint venture: “Our collaboration with Globalance will allow us to meet clients’ growing demand for sustainable investment both rapidly and credibly. At the same time, we are laying the basis for the alignment of our offering of investment advisory services and asset management with future requirements.” In future, therefore, Maerki Baumann plans to systematically incorporate sustainability considerations in both its investment and its reporting activities.

### **Diversified basket of future-oriented equities**

The new “Equities Global Impact” focus module is based on a globally diversified basket of around 30 individual stocks. To be even considered for inclusion, equities must simultaneously meet Globalance’s three criteria of “futuremovers”, “positive footprint” and “financial quality”. With this approach, our clients can generate both a financial and an ethical return by channelling their money in such a way that it becomes part of a solution to the numerous global challenges.

In its joint venture with Globalance, Maerki Baumann is looking to build on its strengths at the level of investment strategy and stock selection, and deploy these in an even more targeted way: “Our investment focus already lies on high-quality companies that exhibit sustainable profitability and stable growth”, explains Konstantinos Ntefeloudis, who is responsible for managing the modular investment solution at Maerki Baumann. The private bank is convinced that the consistent application of sustainability criteria can further improve portfolio quality.

### **Maerki Baumann & Co. AG – Private Bank**

The Zurich-based private bank Maerki Baumann & Co. AG focuses on its core competencies of investment advisory services and asset management, as well as providing services for independent asset managers. The innovative traditional bank is an unlisted family-owned company that takes a long-term view and offers its services from Switzerland only. Its investment philosophy based on independence, security and transparency is reflected in the fact that it refrains from using proprietary products, as well as in its very solid capital base and transparent performance. With its modular investment approach and crypto offering, the private bank underscores its aim of combining the traditional with the new. As at 31 December 2019, Maerki Baumann had assets under management of approximately CHF 8.5 billion, of which 80% originated in Switzerland and 10% in Germany.

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