

Institutional Management



A long tradition

Banque Bonhôte, founded in Neuchâtel in 1815, can claim a tradition of finely honed skills in private banking and wealth management, our core business.

The compact structure of our Bank guarantees efficient, flexible and speedy responses to abrupt market movements.

Our size also enables us to develop and maintain a close relationship with each of our clients, built on trust and the quality of our services.

The Bank's shareholder base is comprised of individuals rather than companies, a large majority of them senior executives and staff members. This ensures our independence and immunity to conflicts of interest, while providing the stability needed for our Bank to thrive well into the future.



A Dynamic Spirit

Set up in its current form in 1992, Banque Bonhôte has since experienced remarkable growth.

In an environment which is constantly changing, dealing with the complexity of financial markets requires significant resources and focused expertise. Our company therefore continually enhances its human and technological skills in order to satisfy the most exacting requirements.

Its flexible and dynamic organisation enables Banque Bonhôte to offer its private clients a wide range of services that reflect the refined and professional approach it has adopted in the field of global wealth management.

Institutional Management

We stay focused on our management skills, an area where we can offer genuine added value.

Our values

We offer institutional clients not only a complete suite of management services, but also and more importantly, a relationship based on teamwork aimed at fully attaining their objectives.

Thanks to a thorough understanding of our clients and their expectations, we can provide them with advice and account monitoring that are perfectly tailored to individual needs.

Our focus is on the long term. We believe firmly in the effectiveness of active management and in the use of hedge fund strategies to reduce portfolio volatility.

Our investment philosophy, with its flexible, fast-reacting implementation, represents a real alternative in the wealth management universe.

Our strengths

In the asset classes that we do not track directly, we take advantage of our independence and experience to pick the best-performing external funds. This gives institutional clients access to a diversified range of products managed by the world's top talent.

When it comes to fundamental research, we rely on the work of our own securities analysts as well as on information gleaned from our contacts in the financial community.

Our Bank also markets proprietary investment funds incorporated in Switzerland. They cover a range of traditional as well as alternative asset classes that can be slotted seamlessly into allocation grids.

Finally, as a member of the Swiss Stock Exchange we are able to execute trading orders on the best possible terms, without having to deal through brokers.



Investment Process

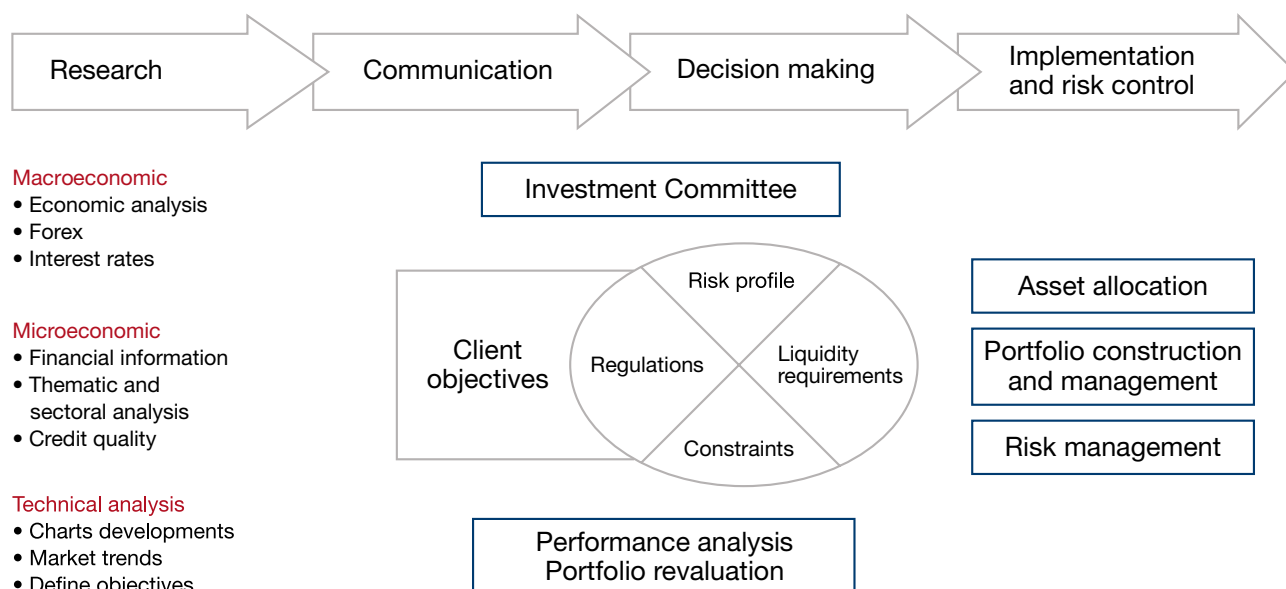
Banque Bonhôte & Cie SA uses an effective, tried-and-tested investment process that boasts a strong track record

The Investment Committee draws up our investment strategy following in-depth analysis of the general economic environment and of country, sector and company fundamentals.

Thanks to this comprehensive approach, all our portfolio managers share the same overview of the situation and of prevailing trends in financial markets.

Applying this strategy in accordance with clients' individual objectives, we then determine asset allocation and the appropriate fluctuation bands for the constituent asset classes.

The underlying assets are monitored constantly to ensure that they remain within the prescribed percentage limits, are consistent with our choices and are ideally suited to market conditions.





Customised Solutions

After carefully taking into consideration the requirements and expectations of each institutional client, we determine the client's risk appetite and performance objectives.

It is on this basis that we decide the most appropriate investment strategy.

Then, depending on the strategy we have set, we determine the asset allocation and pick the securities, countries and currencies that will be included in the portfolio.

Devising strategy is fundamental to the process as the choices made will shape over 80% of the portfolio's return.

Another aspect of asset allocation is that each portfolio is managed actively and on an individual basis, depending on how we expect the markets to behave. Each decision is intended to enhance the risk profile and reduce volatility.

Our team draws up a composite, easily accessible performance report for each institution, enabling it to track its portfolio in detail.



In an environment fraught with increasing complexity, capital preservation and growth play a central role in the fulfilment of institutions' objectives. It is our belief that properly structured, regularly updated asset allocation can contribute markedly to the creation of value.

Our Services

We have devised a number of asset management solutions.

General mandates

These are balanced mandates that cover traditional and alternative asset classes, providing you with personalised management in line with your own investment criteria.

LPP Optimum

In association with Koris International, this mandate provides an asymmetric risk profile enabling institutional investors to withstand large-scale market downturns better while still participating as much as possible in uptrends.

Optimised Swiss Equities

This mandate offers diversification across four management styles, enhancing the return/risk ratio.

Discretionary Mandate in Responsible Investing

The Banque Bonhôte & Cie SA has teamed up with Conser Invest SA to offer clients a Discretionary Mandate in Responsible Investing (RI) that, as part of its investment process, takes into account environmental, social and governance (ESG) criteria of selected companies.

Special mandates

Would you like to invest in a particular segment? We will be glad to build for you a solution comprising specific investments, e.g.:

» **Equities**

» **Active management**

The objective is to exploit market inefficiencies as shrewdly as possible. Based on value analysis we select shares of first-rate companies across a diversified range of sectors.

» **Semi-active management**

In this approach we separate your equity holdings into two sections, one that replicates a benchmark and one containing a pick of shares based on our convictions.

» **Passive management**

Here we track the benchmark of your choice using a combination of exchange-traded funds (ETFs).

» **Fixed income**

In line with your prescribed currency weightings, we allocate your bond holdings across the capital market segments. Performance is generated by choosing top-quality borrowers and by reading the trend of the yield curve.

» **Investment funds**

Meticulous screening enables us to pick investment funds that tone with our overall strategy. We can also provide theme mandates, for example composed of indirect real estate holdings, to round out your investment portfolio.

Banque Bonhôte & Cie SA



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This company meets the highest standards of social and environmental impact

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