

GMG CIO Services

Take your investments
to the next level

What is an Outsourced CIO?

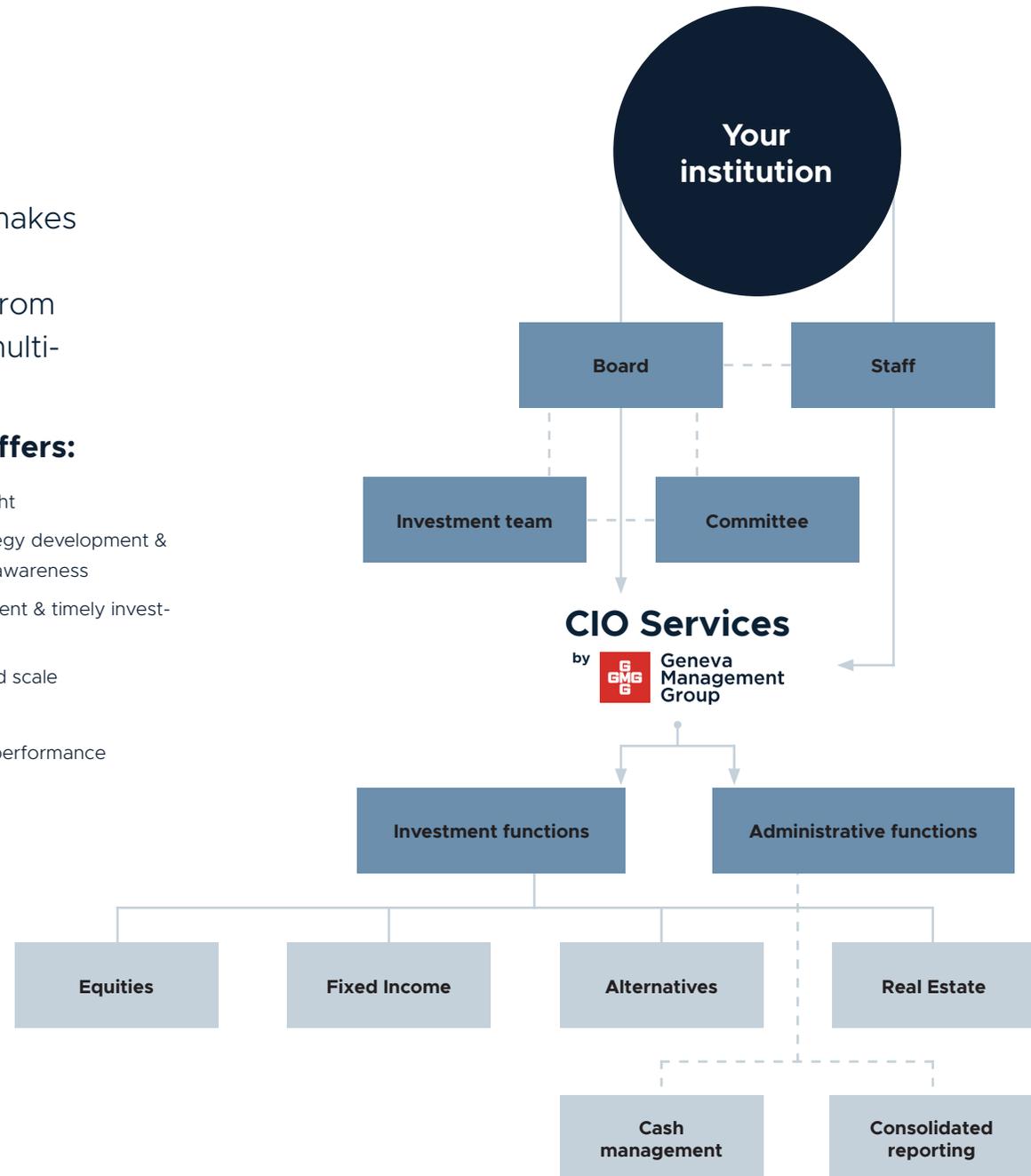
An Outsourced Chief Investment Officer (OCIO) makes available the full range of services a CIO normally provides. Institutions using such a service range from pension funds to endowments, NGOs, single or multi-family offices, and ultra-high net worth clients.

Reasons for out sourcing:

- ✓ Improved risk management
- ✓ Cost savings
- ✓ Lack of internal resources
- ✓ Additional fiduciary oversight
- ✓ A solid regulatory institutional process
- ✓ Streamlined investment implementation
- ✓ Strategy development

What an OCIO offers:

- ✓ Comprehensive oversight
- ✓ Investment Policy strategy development & oversight & regulatory awareness
- ✓ Daily monitoring + Efficient & timely investment decisions
- ✓ Enhanced efficiency and scale
- ✓ Single point of contact
- ✓ A long track record of performance



Why work with Geneva Management Group?

GMG brings a rich combination of experience and competence to every partnership.

The Geneva Management Group (GMG) is an award-winning financial services provider based in Switzerland since 2000. Its operations are organised into two main divisions: asset management and multi-family office services.

Our structure and 20+ years of experience allow us to provide an unparalleled service tailored to meet the dynamic and changing needs of individuals, families, intermediaries, institutions, and corporations.

GMG Asset Management SA is regulated by FINMA (Swiss Financial Market Supervisory Authority) and experienced in managing both funds and assets with access to capital markets around the world.



How we work

We work methodically to understand your situation and goals. Every client, company and organisation has a unique set of circumstances that no one package can address. That's why every solution we provide is tailored to your conditions, to address your specific needs.

We operate with full transparency and we provide total accountability for our services.

We develop risk-management strategies based on clients' stated objectives, leveraging sophisticated analytics and dynamic portfolio monitoring that provide our clients transparency and oversight throughout the investment process.

What are the benefits of working with GMG?

1. Assets under management or advisory by GMG total some CHF 1B across asset classes.
2. We bring more than 20 years of experience working with asset managers and family offices.
3. Our award-winning teams have experience both on the sell and buy sides of the market and understand the needs of each investor profile.
4. We operate on a values-first basis — five guiding values direct our investment decisions — transparency, conflict free, expertise, innovation and relevance.
5. Responsible investing — we're on the way to be among the few Swiss-based Asset Managers with a certified ESG profile.

20+
Years of exp.

1B
AUM

10+
Awards

5
Guiding principles

ESG
Committed

Our CIO Office

Our team consists of highly experienced individuals with a successful track record in the fund industry and investment banking.

Belal Mohammed Khan

Belal joined GMG as Chief Investment Officer in 2021. Prior to this, he spent 15 years at HSBC Private Bank Switzerland, where he held several positions including CIO (2016–2021), Belal's expertise and extensive work experience in foreign exchange sales and commodities have taken him to many leading banks, such as Merrill (formerly Merrill Lynch Investment Bank), Royal Bank of Canada, and Bank of Tokyo, among others.



François Botta

Prior to joining GMG as a portfolio manager, François worked as a private banker for Coutts and Co Suisse, covering the UK market and then for Union Bancaire Privée. He holds a CFA and a Master in Business Administration from the Ecole des Dirigeants et Créateurs d'Entreprises in Paris.



Marc Currat

Marc is a portfolio manager at GMG. Previously, he spent 10 years as a portfolio manager for global emerging market equities at Deutsche Bank's DWS. Before that, he served as an equities and quant analyst at Surperformance SAS after working as an auditor advisor at Currat & Associates SA. Marc holds a BSc in Management from CIBU and an MBA in Finance from International School of Management & St. John's University.





**Geneva
Management
Group**

Swiss Precision. Global Solutions.

20
YEARS
ANNIVERSARY



Image: GMG staff and investment committee members based in Switzerland (April 2022).

Making wealth work for good · Our responsibility

We believe that private corporations can and should meaningfully drive initiatives that support positive change in the world. We are working as a company to ensure that our interests and activities are aligned with our commitment to responsibility.

Investing in good foundations with Real Estate

Investing in real estate should create value for each party at every step of the process, down to the inhabitants of the properties themselves.

The assets we acquire meet a strict criteria, which together promote various sustainability initiatives, including carbon emission reduction, recycling and rehabilitation of buildings, and the protection of trees and wildlife.

We also promote the acquisition of properties that guarantee accessibility for persons with disabilities in addition to community and public facilities, neighbourhood life and the principle of the city of short distances.

Encouraging responsible investing with Equities

The evidence is clear — to drive transformative change for a better future, a combined effort is required from all stakeholders. The finance sector is no exception, which is why we're enabling our clients to also part take in the transition to a sustainable economy.

More specifically, our clients are invested in private equity funds focused on the fast-growing energy transition sector. By offering access to specialized boutiques, we're able to help those we work with invest responsibly through investment vehicles that drive a range

of sustainable initiatives, including developing efficient energy solutions, increasing the supply of renewable energy, and reducing carbon emissions through low-carbon mobility infrastructure.

Excluding societal harms through Active Management

Additionally, our approach to sustainable investment outlines a clearly defined exclusion criteria for our Swiss equity mandates. Sectors and companies that have a evident negative impact on society or the environment are excluded from our investment universe.

Our sustainable strategy for Swiss equities excludes companies that earn more than 5% of their turnover in the fields of weapons manufacturing, nuclear energy, tobacco, gambling and adult entertainment.

Cultivating a culture of respect and diversity through People

We hire and actively promote talented people, regardless of gender, ethnicity, or cultural background, and we provide an entrepreneurial and dynamic environment, promoting talents and giving opportunities and recognition to our managers.

The Geneva Management Group is an organization that encourages all employees to take on considerable responsibilities, providing

clear career progression and development.

We empower staff across the organization — the company provides a crucial 'seat at the table' for all employees, including within senior management, to be part of the strategic decision-making, helping to design internal structures and processes.

As a financial services provider operating in three continents (Europe, Asia and Africa), we embrace the urgency to transition to a sustainable economy that benefits not only individuals but also the world we inhabit, creating health, wealth and security for future generations, and we are proactively working with partners to address these problems at the heart of the issue.



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