



# Your Sparring Partner for Transformation

Capital markets play a crucial role – they are intermediaries for capital flows, but also shapers of a viable economy. It is time to move away from outdated business models and invest into innovative technologies. Pioneering technologies offer attractive returns while contributing to our ecological balance and improving the quality of life on our planet. Discover below how you can leverage your wealth to transform the future.

## How to invest into the future?

Three dimensions are crucial:



### FIT FOR FUTURE

We help you identify companies that have developed innovative solutions for the key challenges of our time and are thus successfully responding to megatrends. Our investment strategy empowers you to invest in growth areas while replacing outdated business models.



### GLOBALANCE FOOTPRINT®

Preserving a healthy planet for the next generation is one of the greatest challenges of our time – and at the same time one of the greatest investment opportunities. We solely invest in companies that our research and investment teams have classified as having a positive impact on our economy, society, and environment.



### FINANCIAL QUALITY

An investment is only future-proof if it also demonstrates a strong financial quality. All investments must pass a rigorous financial analysis (e.g. strong balance sheet, sustainable revenue growth, market returns, etc.).

## Your Benefits



### Wealth Preservation and Growth:

Striking a balance between wealth preservation and growth demands a customized approach. We assist you in constructing a robust framework.



### Double Return:

Your wealth generates attractive returns while simultaneously having a positive impact on our economy, society, and environment



### True Collaboration:

Global megatrends present us with complex challenges and require a rethink. We may need a cultural shift in collaboration that goes beyond company boundaries. For us, this means actively sharing our network and expertise with you.



## Our Offering

A wise investment decision is based on expert knowledge, thorough analysis, and a long-term perspective. Allow us to share our in-depth expertise and insights with you, from key megatrends and innovative technologies to the impact of your investments and beyond. We suggest starting your Globalance journey with a complimentary workshop tailored to your individual needs and ideas.



### Your Sparring Partner

Behind a successful person is often a strong team. Let us be your strategic partner for investment decisions – guiding you towards opportunities in growth sectors and advising you on investments in innovative business models.



### Your Tools for Transparency

Compare your portfolios across different banks using our Manager Comparison Report. Evaluate the level of innovation and impact of your investments in real time with *Globalance World*®.

[globalanceworld.com/en](https://globalanceworld.com/en)



### Your Investment Solution

Benefit from a double return by opting for a Discretionary Mandate with Globalance. Choose between a pure equity mandate or multi-asset-class solutions (each in CHF, EUR and USD).

## Who we are?

We are a fully licensed Swiss private bank, founded in 2011, with offices in Zurich and Munich. Our roots go back to 1995, when our founders established SAM, one of the world's leading asset managers for sustainable investments. Four years later SAM launched the world's first and still leading benchmark for sustainable stocks, together with Dow Jones. In the following years, various first editions of sustainable funds have been successfully launched (e.g. in the areas of water, cleantech and climate).

## Why? Our Mission

We empower you to successfully invest in innovative companies that solve global challenges and shape a positive future.

## Our USPs

### 1 Exceptional Stability

As an owner-managed private bank, we are independent and avoid excessive group structures. All employees own shares in Globalance and our Tier 1 leverage ratio is exceptionally high.

### 2 Proven Expertise

With nearly 30 years of experience, we are a pioneer and leader in future-oriented and sustainable investments, with in-depth expertise in megatrends, innovative technologies, impact and beyond.

### 3 Maximum Transparency

We are the world's first bank to have developed *Globalance World*®, a digital world map for your investments and the Manager Comparison Report, helping you to compare portfolios.

## Your first point of contact



Talk to us today about the future of your wealth.

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