



LOMBARD ODIER

Portfolio provider for bank zweiplus.

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bank zweiplus 

Lombard Odier

Portfolio provider for Multimanager-Strategies.

Our company

Lombard Odier is one of the most tradition-rich and successful banking institutions in Switzerland, with headquarters in Geneva. We offer our clients active asset management, outstanding financial products and specialized services.

Tradition and customer focus ...

We look back on more than 25 years of experience in the management of investment funds and fund-based portfolios. Our international clientele comprises private as well as institutional investors.

Values such as trust, transparency and reliability play a significant role in our corporate culture and day-to-day relations with our clients.

... combined with innovation.

Particularly amid rapidly changing times, it is important to scrutinize your actions, question existing concepts and, as neces-

sary, adapt to the new prevailing conditions. We are constantly on the lookout for new investment opportunities and innovative products for our clients, but at the same time without throwing the proven and tested overboard.

Lombard Odier offers its clients comprehensive investment strategies attuned to their personal risk profile. Individual portfolio components in various asset classes are also taken into consideration, including funds or special mandates depending on the client-specific needs.

Based on our clients' preferences regarding risk and liquidity, we rely on traditional and alternative investments as well as active and passive management when investing assets. Taking into account socially responsible criteria can also be a constituent part of the asset management process.

Multimanager-Strategies bank zweiplus.

Our investment philosophy.

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- + In our view, active, tactical management of individual asset classes within the scope of risk profile plays an important role for achieving successful investments. Our investment process is based primarily on the following three principles.
- + **Principle 1:** Focusing on risk. Risks fluctuate over time, and these fluctuations harbor valuable information that is wisely taken advantage of in the management process.
- + **Principle 2:** Fundamental economic data and business cycles provide decisive information, which has a significant impact on the trend in capital markets.
- + **Principle 3:** Technical factors and trends as well as risk premiums associated with the various asset classes are prioritized and taken into consideration in the investment process.
- + We boast years of extensive experience in the area of fund analysis and selection. Regarding the fund-selection process for Multimanager-Strategies, we particularly take into account third-party as well as proprietary products with an above-average performance per unit of risk (i.e. high information ratio) in addition to stable performance over time.

“It’s still too early to draw all the lessons from the financial crisis. But if there’s one thing investors have been reminded of, it’s that asset allocation remains the key challenge in managing a portfolio.”

Christophe Morel, Head of Tactical Overlay Management
www.lombardodier.com

**Our customer advisor team would
be happy to be of service.**

Monday to Friday, from 08:30 to 19:00
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