



Welcome to
MIRABAUD

MIRABAUD.COM

MIRABAUD

Accountable for generations



The Mirabaud Group

Join us where tradition meets innovation.

Drawing from a centuries-long tradition of Swiss banking, we are driven by our values of independence, conviction, responsibility and passion.

The foundations of the Mirabaud family business date back to 1819. Today, seven generations and two centuries later, with 14 offices spanning 10 countries and over CHF 31 billion of assets under management, the Mirabaud Group remains family-owned and family-led.

This independence, with no third party dependencies, means we focus solely on the interests of our Clients with the same conviction, expertise and sustainability we apply to our own assets.

Inspired by your goals, we work together to deliver global investment strategies matched to your unique needs. Our com-

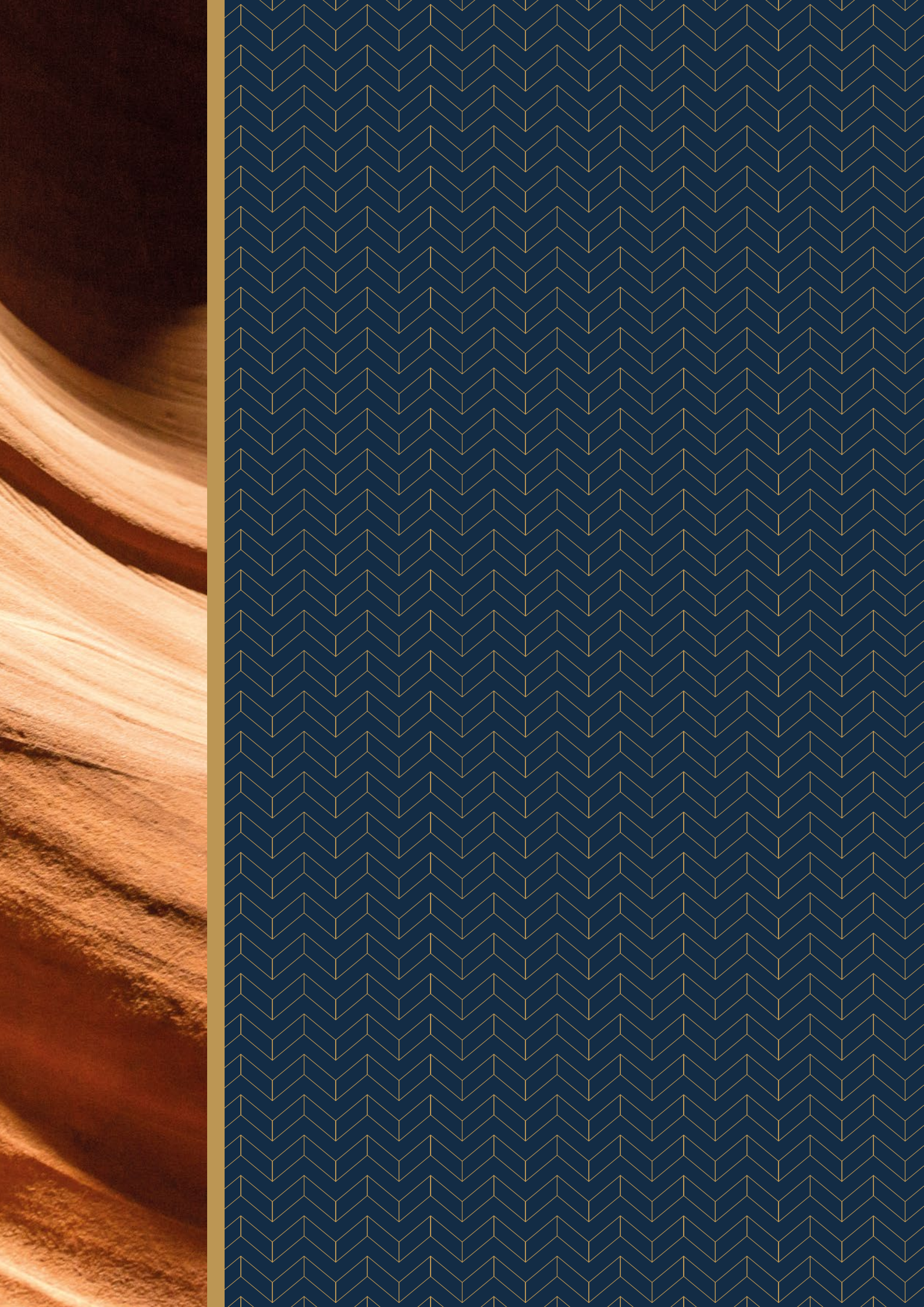
mitment to excellence has enabled us to build trust across generations, creating value with a positive impact on society.

A solid, international banking and financial Group, we offer Wealth and Asset Management services to private and institutional Clients on 4 continents. Our 700 employees embody the entrepreneurial spirit and innovation that have guided the Bank and Mirabaud Managing Partners since its inception.

At Mirabaud, we always take the long-term view, respecting the past and looking to the future. We pride ourselves on a strong and liquid balance sheet, with a Tier 1 ratio above 22%, well above the minimum required level. We are your trustworthy partner for stability and conviction.

We are accountable for generations.

The Managing Partners



Vision, international
reach and values



STRATEGIC VISION

A FUTURE BUILT ON EXPERIENCE

Growing consistently while staying true to its founding principles of independence, conviction, responsibility and passion, Mirabaud has been an innovator from its earliest days. It was the first Swiss bank with a presence in North America and more recently in Dubai. By stepping up its activities in known markets, Mirabaud is spiritedly pursuing its global expansion with confidence, vision and enthusiasm.

22.8%*
CAPITAL RATIO

Mirabaud prides itself on a capital ratio well above the regulatory requirements. Mirabaud constantly develops its technology and the expertise of its employees in order to enhance its ability to deliver an unsurpassed, tailored service.

31.7*
BILLION CHF

Trends in assets under management over the past 20 years reflect stable and steady growth.

700
EMPLOYEES

A network of expertise at your service, at the heart of the world's major financial centres.

14

OFFICES

10

COUNTRIES

4

CONTINENTS



SWITZERLAND

GENEVA
ZURICH
BASEL

CANADA

MONTREAL

LUXEMBOURG

LUXEMBOURG

ITALY

MILAN

**UNITED
KINGDOM**

LONDON

URUGUAY

MONTEVIDEO

FRANCE

PARIS

BRAZIL

SÃO PAULO

SPAIN

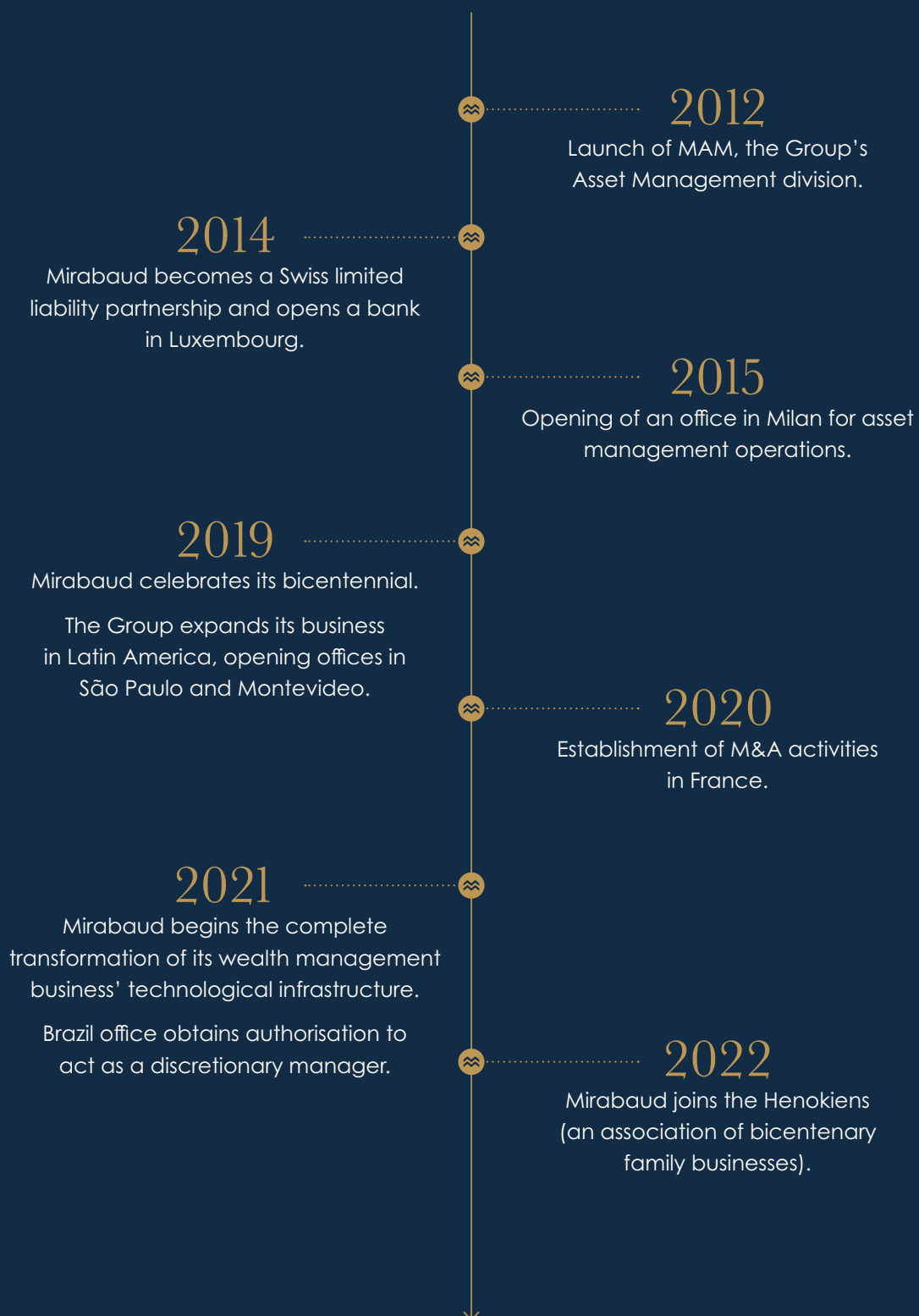
MADRID
BARCELONA
VALENCIA

**UNITED
ARAB
EMIRATES**

DUBAI

TWO CENTURIES OF BANKING





VALUES

These are the reasons Mirabaud
is a company you can trust:

Independence

As a bicentenary family business, managed by the 7th generation of Partners with no third party or shareholder dependencies, we can focus solely on the interests of our Clients – with a total alignment of interests. Our balance sheet is solid and we have a high liquidity ratio. As entrepreneurs, we think in terms of years, not quarters. We foster independent thinking and acting, without bias or influence, and always with the best outcomes for our Clients in mind.

Conviction

We are convinced that human talent makes a difference, from the way we serve our Clients and manage their portfolios to the way we run our Group as entrepreneurs. We focus on giving our experts the culture and environment they need to make use of their talents and deliver value for our Clients. Our active managers have strong ideas and convictions.



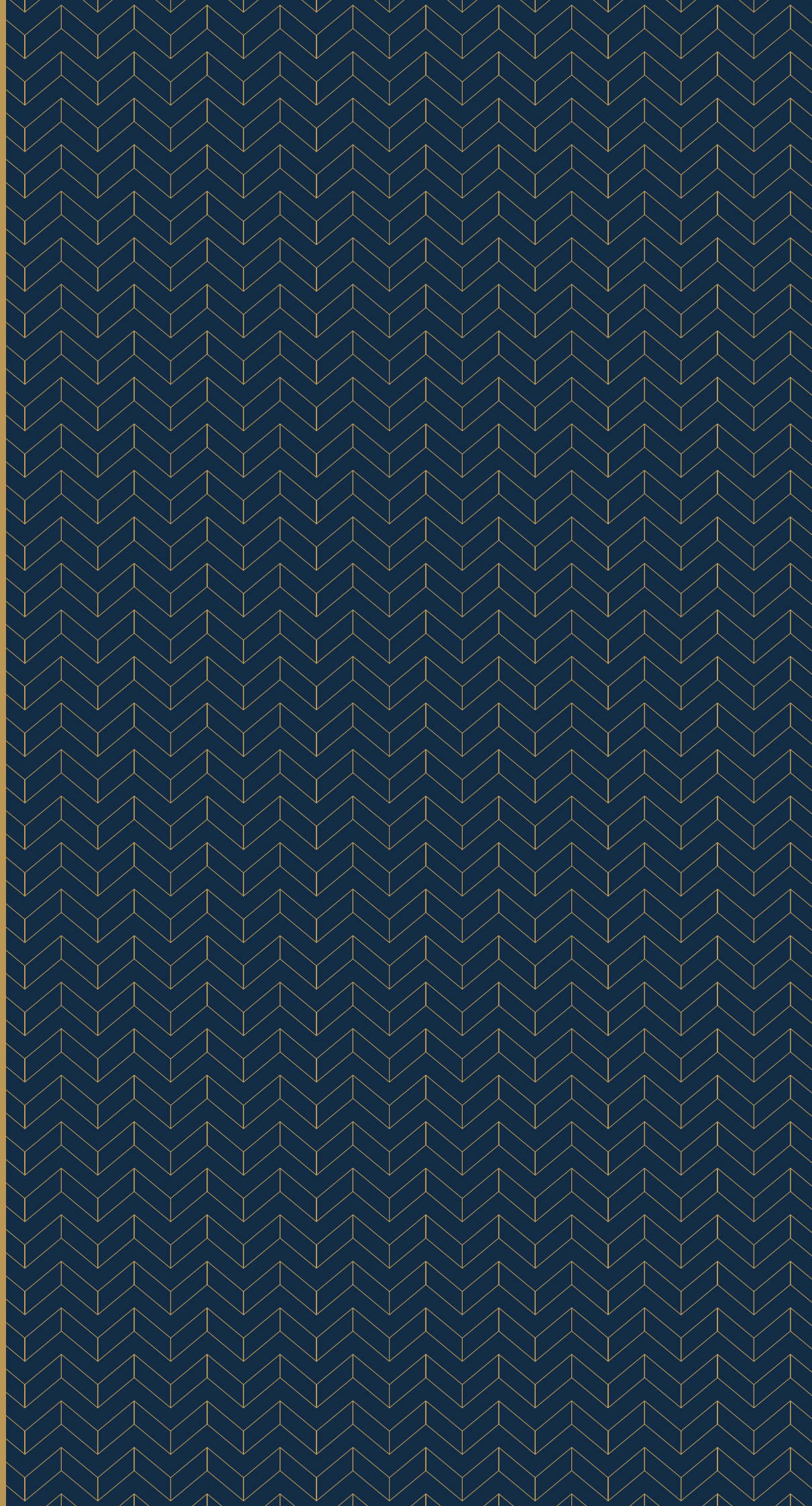


Responsibility

For 200 years, our company has passed down through the generations, growing stronger and remaining relevant as we continuously evolve and adapt to the changing times. This acts as a guarantee of our solidity, sustainability and longevity. Today, this sense of responsibility is reflected in our relationships with our Clients, each other and the wider environment, as we proudly continue to be 'accountable for generations'. Our commitment extends beyond today.

Passion

We are curious experts, open to new ideas and excited by challenges, building towards what's next. Taking inspiration from our Clients' goals, we work together to deliver service excellence and investment strategies matched to their needs.



Our core areas of activity



WEALTH MANAGEMENT

A diversified offer
at your service

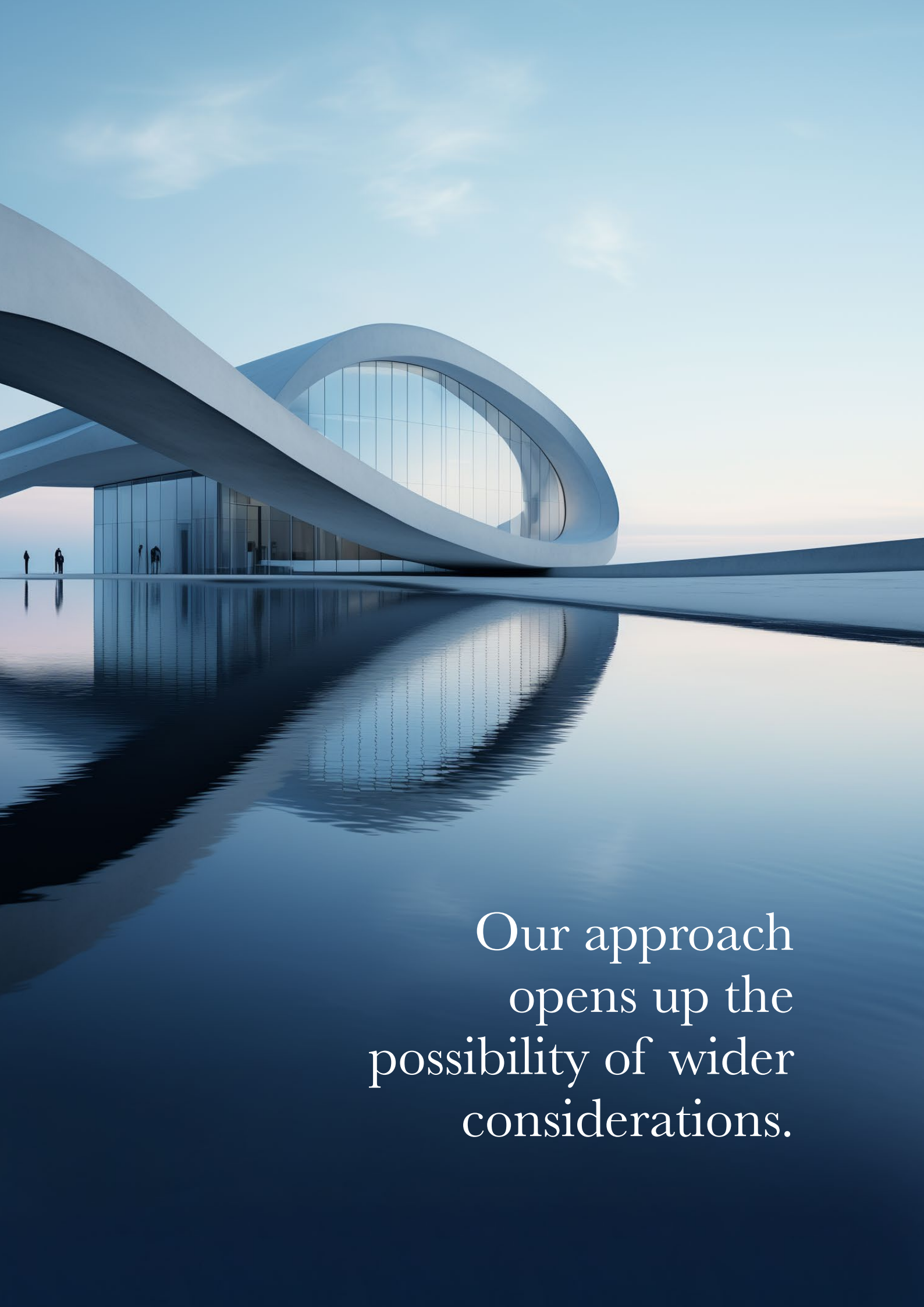


A PERSONALISED, COMPREHENSIVE AND INDEPENDENT APPROACH

In today's complex and interconnected world, excellence in wealth management requires specialised expertise. We design long-term, highly personalised investment solutions. This comprehensive approach allows us to build tailored portfolios and offer a level of investment advice typically only found within a family office. Always keeping the next generation in mind, our approach opens up the possibility of wider considerations such as wealth engineering, tax, succession and pensions.

FINANCIAL RESEARCH AND INVESTMENT SOLUTIONS

Immerse yourself in a world of in-depth analysis by our in-house financial research team, which oversees all asset classes. Discover how our unique investment universe not only supports, but enhances your understanding of market dynamics.

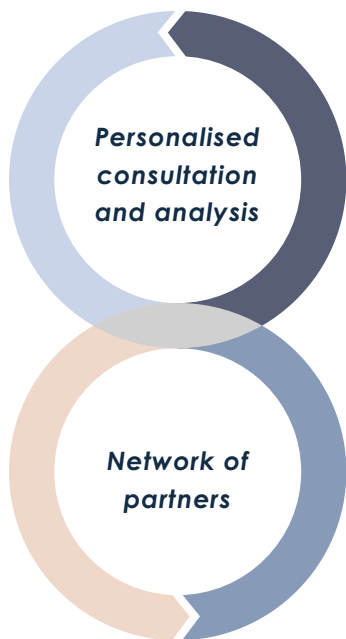


Our approach
opens up the
possibility of wider
considerations.

WEALTH PLANNING

We go beyond managing your wealth, working alongside you on comprehensive aspects of passing it on to the next generation. Succession planning, understanding taxation and preserving generational wealth are not just services; they are the pillars of our commitment to your lasting prosperity.

360-degree support



Questions around the following topics

Pension provision, Taxation
Real estate, Inheritance
and donations, Philanthropy

Plan of action

Deciding on measures
to be taken and
presenting a clear
implementation plan

First meeting

Gathering information,
identifying opportunities for
optimisation and answering
initial questions

Implementation and monitoring

Wealth Management
Asset Management

Network of partners

Mortgage brokers
Occupational pension solution specialists
Philanthropy experts
Tax lawyers
Experts from other areas of law

PRIVATE ASSETS

Enhance your investment portfolio with our exclusive Private Asset offering: Private Equity (PE), Infrastructure and Real Estate Club Deals. Designed for individuals with a long-term view, this distinctive service offers unique direct investment opportunities and diversifies your financial assets.

We have built a diversified and structured offering that provides access to (1) best-in-class funds on a diversified basis, (2) thematic funds and (3) selected club deals.

Our private assets offering is integrated into our asset management



ASSET MANAGEMENT



WORKING WITH OUR CLIENTS

Across our regional offices, we serve a broad range of wholesale and institutional Clients from financial advisers and family offices to investment banks and pension schemes. The Mirabaud culture flows through the asset management business and ensures that all Clients benefit from high quality service and investment strategies relevant to their requirements.

A SUSTAINABLE APPROACH TO INVESTING

Every investor is an agent of change. We take an active approach to sustainability by helping companies and stakeholders improve their ESG practices. Engaging with the companies we invest in brings us collectively closer to a sustainable future and delivers better long-term outcomes for our investors.

Moving to a more sustainable world will create new investment opportunities as some companies evolve, not just to survive but to thrive by expanding across new horizons. For high conviction investors like us, it is the perfect environment to deliver lasting value for our Clients.



OUR INVESTMENT OFFERING

SRI TEAM			
Fixed Income Global credit Emerging Market Debt Fixed Maturity Convertibles	Equities Emerging Markets Europe Global Swiss	Private Assets Real Estate Private Equity	Multi-Asset Solutions

FLEXIBLE FIXED INCOME

Given the pace and unpredictable nature of change across Fixed Income markets, we believe that investing needs to be dynamic and responsive to make the best of every situation.

Whichever fixed income market segment they target, our Clients need agility and flexibility to rapidly adopt the right exposure. This has shaped our high conviction, unconstrained approach, utilising various hedging techniques and dynamic risk allocation to adapt quickly to changing market conditions.

GLOBAL EQUITIES

Our equity teams are passionate stock pickers, empowered to develop investment strategies that play to their strengths, providing Clients with effective ways to access equity markets at a regional and global level.

Across all strategies, sustainability factors are embedded in the investment process. Value-add comes from a focus on deep company insight and active engagement to support and encourage company growth.

PRIVATE ASSETS

Our approach is to partner with industry experts. Together we leverage their extensive knowledge of their sector and network of valuable connections to identify compelling, long-term investment opportunities.

We empower those with the talent, passion and purpose to change the world – financing innovation, creativity and craftsmanship across business and real estate.



Governance





MANAGING PARTNERS

*As co-owners
and managers, we look
after our Clients' assets
with the same care,
concern and long-term
view we apply to our own.*



Camille Vial
Managing Partner



Lionel Aeschlimann
Senior Managing Partner



Nicolas Mirabaud
Managing Partner

Mirabaud is so much more than a name.
It is synonymous with longevity, protection,
growth and succession.

Lionel Aeschlimann, Senior Managing Partner

EQUITY PARTNERS

As investors of the company with management roles, our Equity Partners are involved in the development of the Group.



Umberto Boccato
Chief Executive Officer
Mirabaud Asset Management (MAM)



Louis Fauchier-Magnan
Head of Wealth Management
Switzerland – Romandy



Thiago Frazao
Head of Wealth Management
Emerging Markets



Andrew Lake
Chief Investment Officer (CIO)
Mirabaud Asset Management (MAM)



François Leyss
Group Chief Operating Officer (COO)



Julien Meylan
Group Chief Financial Officer (CFO)





Our commitment



CORPORATE SOCIAL RESPONSIBILITY

At Mirabaud, our mission, vision and values are the common thread running through all our activities. Reflecting Mirabaud's culture since its founding in 1819, they are the source of our corporate social responsibility (CSR) strategy.



Mirabaud is deeply committed to a CSR strategy that encompasses its Clients, employees and all other stakeholders. The Mirabaud CSR Forum comprises two Managing Partners and adheres to the following pillars:

1. An **economic responsibility** strategy intended for Clients, the Group's economic partners and the wider economy;
2. A **social responsibility** strategy aimed at all Mirabaud Group employees;
3. An **environmental responsibility** strategy that looks at how natural resources are used and how to proceed for the environment;
4. A **societal responsibility** strategy for communities and the wider society.

The CSR Forum meets quarterly to review actions and measures and analyse their impact.

Mirabaud's CSR efforts aim to contribute to the United Nations 2030 Sustainable Development Goals (SDGs). They focus specifically on eight SDGs:

- good health and well-being
- gender equality
- decent work and economic growth
- sustainable cities and communities
- responsible consumption and production
- climate action
- life on land
- peace, justice and strong institutions.

RESPONSIBLE INVESTMENT

At Mirabaud, we believe responsible investing has a positive and lasting impact on financial performance.

A pioneer in this field, Mirabaud signed the United Nations-supported Principles for Responsible Investment (UNPRI) for sustainable growth in 2010 and we are proud to hold the highest possible rating for responsible investing.

Almost 90% of Mirabaud Asset Management funds align with the standards of articles 8 (ESG – promoting environmental and social characteristics) and 9 (impact - contributing to an environmental or social objective) of the European Sustainable Finance Disclosure Regulation (SFDR).

In 2022, Mirabaud furthered its commitment to Socially Responsible Investment (SRI) through a range of activities. These include joining

the Net Zero Asset Managers Initiative (NZAM), extending coverage of ESG research, launching dedicated climate products and facilitating investments in renewable energy projects.

Mirabaud has made significant strides on the climate resilience of its investments, and the Group is contributing to financing the transition to a sustainable economy in line with the Paris Agreement.

Mirabaud also continues to expand its Private Equity offering with an active focus on ESG criteria and a determination to enhance societal impact.

The Group contributes to financing the transition to a sustainable economy.

A PASSION FOR CULTURE



Over the years, Mirabaud has forged close ties with various cultural institutions, artists and major artistic events in the countries where it is active. This approach also reflects the Mirabaud Group's personalised, innovative and long-term vision in its activities.

A dedicated patron of the arts, Mirabaud has curated an eclectic collection that features contemporary works by young, emerging artists and established talents.

Mirabaud's enterprising spirit of discovery makes supporting contemporary, modern and avant-garde art an obvious choice.

Mirabaud is a proud partner of the Museum of Modern and Contemporary Art (MAMCO), the Quartier des Bains association in Geneva, the Geneva Lux Festival and Bechtler Foundation in Zurich .

In 2022, Mirabaud entered a multi-year partnership with the Centre Pompidou in Paris to support a selection of exhibitions - an agreement it renewed in 2025.

Our thirst for innovation
and forward-thinking stems
from our ability to reevaluate
the world. The contemporary
art that surrounds us at
Mirabaud, serves as a daily
reminder.



Centre Pompidou



MAMCO



Headquarters of Mirabaud Group



www.mirabaud.com

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Discover more

