INDEPENDENCE AND CONVICTION
Mirabaud is an international banking group that provides a clientele of private and institutional investors, companies and finance professionals with highly customised investment advice, private banking and asset management services. Based in Geneva, Mirabaud has developed steadily over the years and now employs over 700 staff who, through their experience and expertise, perpetuate the entrepreneurial spirit that has reigned in the bank since its foundation in 1819. The Group now conducts its Wealth Management, Asset Management and Brokerage businesses in the main financial centres around the globe and has offices in Switzerland, the UK, Luxembourg, France, Spain, Italy, as well as in Canada and the United Arab Emirates.
With its long tradition of Swiss banking, Mirabaud fosters values of independence, integrity and discretion with the aim of delivering superior service to its customers both locally and globally.

1819

Almost two centuries of experience in asset management and investment.

31.2

BILLION (CHF)

Trends in assets under management over the past 15 years reflect stable and steady growth.

Net amount as at 30 June 2017
4 MANAGING PARTNERS
As owners and managers, they look after their customers’ assets with the same care as they do their own business.

3 LIMITED PARTNERS
As investors of the company and holding management roles, they are involved in the development of the Group.
“Mirabaud is much more than a name, it is a symbol of continuity. It is also a synonym for foresight, growth and succession.”

Yves Mirabaud
“What we offer our customers is a mind-set. A subtle combination of commitment, respect, proximity and discretion. All of which helps to build valuable long-term personal relationships.”

Antonio Palma

“Surrounding yourself with talented people and preserving your freedom to act are the two key success factors in effective active asset management.”

Lionel Aeschlimann

“Our independence is a guarantee of best advice for each investment decision and the flexibility needed to capitalise on the best opportunities in the markets.”

Camille Vial

See p. 36 for details of their roles
THREE BUSINESSES

SERVING A CLIENTELE OF PRIVATE AND INSTITUTIONAL INVESTORS

WEALTH MANAGEMENT

Wealth management is one of Mirabaud’s foremost areas of excellence. Today, it requires an ever-greater level of expertise to analyse the full complexity of each customer’s individual position. We devise tailored solutions for the long-term, taking into account financial, family and professional considerations. Our end-to-end approach, which is based on an in-depth analysis of needs, enables us to build customised portfolios and provide the highest quality investment advice. It also allows us to take into account broader issues such as financial planning, taxation, inheritance and pension planning, always with the next generation in mind.
ASSET MANAGEMENT

Mirabaud’s asset management services are aimed at a clientele of traditional institutional investors as well as other finance professionals such as banks, independent fund managers and family offices. Mirabaud stands out for its active management supported by an in-depth knowledge of the markets and strong convictions. Our talented asset managers rely on robust investment processes to offer a solid range of funds and mandates, where active management can bring genuine long-term added value to investors.

BROKERAGE

As an independent adviser aligned exclusively with the interests of its customers, for the past 25 years Mirabaud has offered brokerage services to professional and corporate investors who require an uncompromising quality of execution. Every day, at the heart of the markets, Mirabaud offers research, analysis, strategies and recommendations, including on the primary markets, particularly regarding IPOs and raising equity, for listed companies.
CONVICTION

Active asset management is only effective when it combines talent with determination.
CORPORATE SPIRIT

Both as bankers and entrepreneurs, we are committed to making your future projects a success.

INDEPENDENCE

As partners and sole owners, we are free to make choices that are aligned exclusively to your interests.
STRENGTHS

GENUINE EXPERTISE EMBODIED IN DAY-TO-DAY BUSINESS

PERSONALISATION AND CONTINUITY

In wealth management as well as asset management, an investment solution is only appropriate if it is customised and fully tailored to the specific features of each situation and each customer’s present and future needs.

FLEXIBILITY AND RESPONSIVENESS

The markets are, by their very nature, in a state of perpetual flux. To capitalise on this, you must have a degree of freedom and the ability to act fast. That is why Mirabaud believes in active management and works on an open architecture basis to seek out the best investment opportunities.
DISCIPLINE AND RELIABILITY

Mirabaud combines its passion for investment with stringent execution requirements. Each transaction, each trade, is always executed with the aim of achieving the best possible result and with strict control over risks.

PROXIMITY AND AVAILABILITY

No matter where or when, our customers can always rely on their privileged relationship with their adviser, someone who listens to their needs, is always available and can quickly call on the Group’s various areas of expertise.

TRUST AND RESPONSIBILITY

Being able to trust your partner is crucial in any business relationship. This is a sentiment that is strongly rooted in Mirabaud’s values, as respect and ethics are a top priority for each and every one of its employees.
NETWORK OF EXPERTISE

RIGHT AT THE HEART OF THE WORLD’S MAJOR FINANCIAL CENTRES

13 offices

8 countries

3 continents

700 employees

SWITZERLAND

GENEVA

ZURICH

BASEL

ITALY

SPAIN

MADRID

BARCELONA

VALENCIA

SEVILLE
Mirabaud has grown steadily over the years, in line with its principles of independence, ethics and responsibility, while preserving the entrepreneurial approach that has always set it apart. It is a limited liability partnership incorporated in Switzerland, owned and managed entirely by its Partners, who head all the Group’s business activities. A reputed and respected player in the industry, Mirabaud has adjusted over the years to economic and financial change as well as evolving customer needs. This change has made Mirabaud more robust and it continues to grow.

A Group with international reach, Mirabaud has reinforced its technological and human resources and built up its three business lines by continuing to invest in Switzerland and in the international markets. To deliver superior service to its customers, the Group operates as well as a bank in Luxembourg, France, Spain, United Kingdom and the United Arab Emirates, essential links for expanding its array of services in Europe and the Middle East, where it already has a strong local presence. We have further developed our pension planning services for private banking customers by pooling all of the Group’s skills.
In addition, new products are now reaching maturity within an optimised range of funds, while others are being launched. By stepping up our activities in the markets we know best, we are pursuing our expansion with confidence, vision and enthusiasm.

20.6%

A capital ratio well above the regulatory requirements reflects our robustness.

Data at 30 June 2017
1819
Mirabaud is founded in Geneva.

1857
Mirabaud becomes a founder member of Switzerland’s first stock exchange and helps to develop the national banking system.

1873
Mirabaud is a pioneer in alternative investment.

1931
Mirabaud is a co-founder of the Geneva Private Bankers Association.

1985
Mirabaud opens its first international office in Montreal.

1990
Mirabaud enters the UK market, providing brokerage and asset management services to institutional and retail investors out of London.

1998
Mirabaud expands in Switzerland, launching an office in Zurich.
2003

2004
Mirabaud strengthens its Swiss presence with a new office in Basel.

2007
Mirabaud enters the Middle East market with an office in Dubai, which later gained bank status in 2010.

2010
Mirabaud gains a strong foothold in the Spanish market, with offices in Madrid and Barcelona. Valencia follows in 2012 and Seville in 2014.

2011
Mirabaud extends its fund management business to Luxembourg.

2014
Mirabaud becomes a Swiss limited liability partnership and opens a bank in Luxembourg.

2016
Opening of a representative office in Milan for operations in connection with asset management.
A STORY OF PARTNERSHIP
HANDED DOWN SINCE 1 AUGUST 1819
COMMITMENTS
SUPPORTING SUPREME CHALLENGES

BOL D’OR MIRABAUD

Over the years and the flow of many waters, Mirabaud has made a name for itself in sailing that fits perfectly with its operations: bringing together talented people ready to meet challenges. Held for the first time in 1939, the Bol d’Or is World’s biggest inland lake regatta. Mirabaud has sponsored this not-to-be-missed event since 2005, each year lining up crews that have won several times in their category. It is a unique occasion to compete against the very best in the world of sailing.

MIRABAUD SAILING IMAGE AND VIDEO AWARDS

At the Yacht Racing Forum – an annual gathering of the main players in the international sailing arena – Mirabaud presents the Mirabaud Yacht Racing Image trophy and Mirabaud Sailing Video Award. These prizes go to the best sailing videos and photos of the year taken at a regatta. These competitions have been sponsored by Mirabaud since their inception. Mirabaud associates its name and image with sailors and exceptional challenges.
In harmony with its business, Mirabaud has always had a passion for classical music, an art that requires a blend of talent, hard work and high standards. To share this passion with our customers, we organise concerts in locations where Mirabaud has an office, in association with the renowned orchestra conductor Joji Hattori.
CONTEMPORARY ART

Works of art bear beautiful witness to our past and act as a mirror onto our society. By showcasing contemporary art next to pieces from centuries past, Mirabaud is building a bridge between tradition and modernity – the same notion that drives the long-term vision the Group pursues in its management activities. Mirabaud’s contemporary art collection includes both young, up-and-coming artists and established talents. As a committed player in the contemporary art arena, Mirabaud is notably a partner of the Museum of Modern and Contemporary Art (MAMCO) and the Quartiers des Bains association in Geneva, as well as of the International Contemporary Art Fair (FIAC) in Paris.
RESPONSIBLE INVESTMENT

Convinced that social and environmental factors and governance methods have a sustainable impact on financial performance, Mirabaud incorporates sustainability criteria in its analyses and investment process to create long-term value. The Group has signed the United Nations Principles for Responsible Investment (PRI) to promote sustainable growth.
SOCIAL RESPONSIBILITY

No financial operator involved in asset management or investment can conduct its business without assuming certain responsibilities. At Mirabaud, this is reflected by a strong commitment to promoting best practices in our investment activities as well as adopting a code of conduct that aims to guarantee our employees good working conditions, promote responsible management of natural resources and support initiatives with a social impact.
MAIN ROLES HELD BY THE MANAGING PARTNERS

Yves Mirabaud – Senior Managing Partner of Mirabaud SCA, Chairman of the Board of Mirabaud & Cie SA, Chairman of the Board of Mirabaud (Middle East) Limited (Dubai)

Antonio Palma – Managing Partner of Mirabaud SCA, CEO of Mirabaud & Cie SA, Chairman of the Board of Mirabaud & Cie (Europe) SA

Lionel Aeschlimann – Managing Partner of Mirabaud SCA, Vice-Chairman of the Board of Mirabaud & Cie SA, CEO of Mirabaud Asset Management (Suisse) SA, Chairman of the Board of Mirabaud Asset Management (España) S.G.I.I.C. SA*, Chairman of the Board of Mirabaud Asset Management (Europe) SA (Luxembourg), Chairman of the Board of Mirabaud Asset Management Limited (London)**

Camille Vial – Managing Partner of Mirabaud SCA, Member of the Executive committee of Mirabaud & Cie SA, Director of Mirabaud & Cie (Europe) SA

* Mirabaud Asset Management (España) S.G.I.I.C. SA is supervised and regulated by the agency in charge of the Spanish Stock Markets (CNMV)
** Authorised and regulated by the Financial Conduct Authority

ROLES HELD BY THE LIMITED PARTNERS

Etienne d’Arenberg – Head Wealth Management United Kingdom, Member of the Board of Directors of Mirabaud & Cie (Europe) SA

Nicolas Mirabaud – Member of the Executive Committee of Mirabaud & Cie SA, Head Wealth Management - Commercial of Mirabaud & Cie SA, Head Wealth Management Switzerland

Michael Palma – Member of the Executive Committee of Mirabaud & Cie SA, Director of Operations of the Mirabaud Group, Member of the Board of Directors of Mirabaud Securities Ltd

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