



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *WealthBriefing* AWARDS PROGRAMME



## The Fourth Annual *WealthBriefing* Swiss External Asset Management (EAM) Awards For Excellence 2024

March 2024

# Combining Tradition With Innovation In Asset Management

Since its establishment in 1995, INVICO Asset Management AG, an independent Swiss asset manager based in Zurich, has earned a reputation as a respected and trusted partner in the industry. Our firm specialises in delivering bespoke solutions for individual portfolios, serving a diverse clientele that includes families, institutions, and businesses. We pride ourselves on our personal service and the comprehensive expertise of our team.

*"Our approach focuses on independence, transparency, flexibility, and expertise, enabling us to meet our clients' needs and objectives effectively."*

## What was the winning formula of your firm that explains why you won?

Our winning formula hinges on a combination of strategic independence, market agility, deep knowledge, and strong expertise. Our independence from external influences allows us to prioritise our clients' interests and align investments with their visions. Our agility and streamlined organisational structure enable quick decision-making, crucial in today's fast-paced market environment.

The depth of our knowledge and expertise, recognised by leading figures in the industry, allows us to provide valuable insights and advice to our clients. These factors, combined with our proactive approach to market changes and strategic affiliations with top-tier banks have established us as a key player in asset management.

## What are you going to do to remain competitive and stay ahead?

To remain competitive and ahead, we plan to continue investing in our core strengths – our team's expertise, our innovative service offerings, and our commitment to

understanding and meeting our clients' unique financial aspirations. We aim to keep leading the way in introducing groundbreaking investment initiatives like our Future Connectivity, Artificial Intelligence, Biotech, and GreenTech investment products. Maintaining our agility to swiftly adapt to market changes and client needs will also be crucial.

## How do you hope your firm will benefit from getting this award?

Winning this award enhances our credibility and visibility in the wealth management sector, attracting discerning clients and top-tier talent. It serves as a recognition of our team's hard work and dedication, boosting morale and reaffirming our commitment to excellence. We anticipate this accolade will open new avenues for growth and partnership, further solidifying our market position.

## Where do you see the wealth management industry and your part of it going in the next five years?

In the next five years, we see the wealth management industry evolving with a greater emphasis on sustainability, digitalisation, and personalised service. Technological advancements will play a pivotal role in shaping investment strategies and portfolio management.

We anticipate an increased demand for transparent, flexible, and tailored wealth management solutions.

*"INVICO Asset Management AG aims to remain at the forefront of these trends, continuously integrating innovation with tradition to meet our clients' evolving needs and contribute to shaping the future of the industry."*



**Bruno Schneller**  
Managing Director  
**INVICO Asset Management AG**



*Winner*

• **Assets Under CHF 500 Million AuM**



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