

Integrated Asset Management

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After an extensive '**client-profile analysis**', where the subjective experience of acceptable investment risk is paramount, a tailor-made '**risk/reward profile**' is agreed with the customer. This results in a long-term strategic asset allocation over different asset classes, including the respective strategic bandwidths, which is embedded in a formal 'Asset Management Agreement'.

Subsequently, the Investment Framework is drafted, where risk-budgets are allocated, per individual asset class, to several distinguishable sub-asset classes, regions, sectors, investment styles, strategies, factors, themes.

Finally, based on a '**Core-Statellite**' approach, the portfolio is systematically constructed, where in addition to liquid passive financial instruments (**ETF's**), space is allocated to active asset managers, where providing daily liquidity is not a main principle in their investment process.

Track Record