

## TOP MANAGER AWARD 2015/16

<b>Provider</b>	OLZ & Partners Asset and Liability Management AG ('OLZ')
<b>Category</b>	Asset management mandates in reference currency Swiss franc (all risk profiles)
<b>Description</b>	The asset manager systematically achieves results better than the median of the competition

### Summary

We consider the asset management mandates of OLZ to be a very suitable investment solution for private investors. OLZ investment solutions particularly fit the needs of investors who are not averse to investing in equities, and would like to delegate the care of their assets in full to a professional wealth manager. The approach proved particularly successful for a long-term investment horizon.

### Overall assessment<sup>1)</sup>

Manager competence	Very good
Track record	Very good
Cost	Good
Personalisation	Good
<b>Total</b>	<b>Very suitable</b>

<sup>1)</sup> A detailed assessment document can be obtained from OLZ & Partners.

### Strengths of the OLZ investment solutions

- Very good return results compared to other offers
- Systematic inclusion of risk aspects in the portfolio construction
- 'Minimum variance portfolio' as a proven and robust investment approach
- Fair cost structure and good personalisation options

### Return comparison

**Very Good**  
for all risk profiles

The OLZ investment solutions achieve better returns than the median in 72% of the examined occasions. This places the investment solutions in the top 20% of the analysed asset management solutions.

### On the evaluation methodology

ZWEI Wealth Experts carry out an annual analysis of the results achieved by asset management providers in Switzerland. The ones performing best receive the 'Top Manager' award. The current analysis is based on qualitative and quantitative information from 42 institutions and 309 wealth management solutions.

ZWEI Wealth Experts are an independent consulting firm which specialises in serving investors, including providing support in selecting the optimal asset manager. The company was founded by Prof. Dr. Klaus Wellershoff and Patrick Müller.

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