

# INVEST SUISSE

Company Profile 2016

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## INVEST SUISSE PROFILE

INVEST SUISSE mission is to enable clients generate significant sustainable capital growth that matches their investment needs , and enable them achieve superior risk adjusted and maximized absolute positive returns in both rising and falling markets, minimizing risk and lowering the overall portfolio volatility, whilst adhering to the highest international ethical business standards.

INVEST SUISSE is a provider of highly professional investment services for high net-worth individuals and institutional investors, adhering to disciplined investment management process, designed to consistently outperform benchmarks while controlling risk.



INVEST SUISSE offers investors access to global investments and to the top performing Asset Managers worldwide screened from the investment universe, whether it be Global or Regional Equity managers or Exchange traded funds, or alternative investment managers including Hedge Funds, Private Equity, Real Estate and Precious Metals.

INVEST SUISSE provides research and analysis both in house as well as that of Worldwide known partners, which is key element for proper advisory for both individuals and institutions. The research covers market information, investment guidelines, corporate and market developments and new product launches.

## STRATEGY & STYLE

### INVESTMENT STRATEGY

INVEST SUISSE helps clients seeking active management to achieve absolute returns through our Management Experience, and Provision of research and market intelligence. We help clients seeking passive management, through long term exposure to a range of various asset classes in investment that suits their profile and needs. Whatever the approach, we form customized solutions that meet individual income and objectives.



### INVESTMENT STYLE



INVEST SUISSE investment style is special, building professional relationship with clients based on trust, transparency, reliability and precision, applying proper timing and risk management which helps clients achieve their investment goals with proper risk management.

### OUR STRENGTH

INVEST SUISSE dedicates its professionalism in global market knowledge and various investment tools and styles as well as risk management, to provide sound advice, abiding by principals of anonymity, confidentiality, security and efficiency.

Our special strength primarily lies in our expertise in screening the top performing managers of the world, particularly in Hedge funds and Private Equity, employing its stringent Due Diligence process, Concluding several hundred million investments per year.



# FINANCIAL SERVICES

## ASSET MANAGEMENT AND WEALTH MANAGEMENT



INVEST SUISSE has professional in house technical team, licensed in Switzerland, has proven successful track record to generate significant and sustainable capital growth on an annual basis. Our Senior Investment Advisor, with his impressive track record in growing a 50 mill USD hedge fund portfolio into 4 billion portfolio through proper manager selections; and with his unparalleled talent and 35 years' experience in value investment, value stock picking with proper timing in the overall context of market conditions, focused on diversification, avails his talents to service our clients. Our senior Research Advisor, with his impressive experience providing analysis and research, focused on positive risk/reward ratio, and technical trend following approach, acting as a Solution Provider for Omega Research Inc., Miami FL, USA in their range of trading and money management software, he avails his expertise to offer the proper analysis and research to our clients.

INVEST SUISSE has partnership with the top worldwide Investment and Financial Institutions in various asset classes including prime International Banks through which all the services are provided. Through its access to its Partners' whole range of products and services, INVEST SUISSE builds management solutions , using both its own research and it partners' research including the market information and Investment guidelines and advice; and employs stringent Monitoring , including rebalancing and reporting .Within the framework of the overall central investment process, INVEST SUISSE implements the agreed specific personalized strategy for each client and reports on the progress of the investments on a regular basis.

## FINANCIAL SERVICES

### PRIVATE EQUITY

INVEST SUISSE with its worldwide partners, acquires controlling or significant interests with board representations in stable mature well managed businesses, and creates value through operational and financial improvements, management incentives and the use of leverage.

The Private Equity services rendered to clients include regional leverage buyouts, structured equity investments, real estate, and venture capital. It focuses on strong strategic minority block positions in public enterprises, and real estate investments in the region, structured equity investments, venture capital and growth capital investments and on (buy & built strategy). INVEST SUISSE identifies leading companies or new business ventures that will generate high returns from recapitalization, cross-border expansion, or financial restructuring. The purpose of investments in such business is to maximize shareholder value through strong operational growth and capital gain thus realizing value through structured exit to strategic buyers or to public markets within a limited time span. It capitalizes on the investment opportunities generated by its network of relations. This covers Mergers and Acquisitions, business valuation, financial engineering.

#### A. PRIVATE EQUITY FUNDS

INVEST SUISSE helps Prime quality Private equity funds to raise funds after employing stringent Due Diligent process , and provides a tailor-made fund raising solution .It raises growth and acquisition capital for public and private companies.

#### B. PRIVATE EQUITY PLACEMENTS AND SYNDICATION OF PRIVATE PLACEMENTS:

INVEST SUISSE coordinates and helps managing the private equity placement process comprising development of effective marketing strategies for the issuer, leading the negotiations with investors, and achieving optimal transaction structure and terms.

INVEST SUISSE helps syndicating private placements through the creation of special purpose vehicles to insure structuring opportunities to meet local needs.



## FINANCIAL SERVICES

### FINANCIAL ADVISORY ROLE, IPOs

INVEST SUISSE through its partnership with leading International firms, assist organizations to select the right advisor to issue bonds , advise on IPO's, capital raising services, trading , and corporate finance activities.



### REAL ESTATE



INVEST SUISSE advises Institutional Real Estate investors, and identifies unique off-the market Real Estate opportunities globally and regionally. Upon request from Private clients, it creates creative real estate structured products for unique investment opportunities that are syndicated among groups of clients. Through its network of relationships and expertise, INVEST SUISSE locates, analyzes, finances and helps real estate development projects kick off within the region and assist clients develop manage or offload property investments.

# PRINCIPLES OF CONDUCT

## GENERAL PRINCIPLES AND PROFESSIONAL CODE OF PROFESSIONAL CONDUCT BINDING INVEST SUISSE

Asset managers in particular hold a unique place of trust in the lives of millions of investors. Investment professionals and firms who undertake and perform their responsibilities with honesty and integrity are critical to maintaining investors' trust and confidence and upholding the client covenant of trust, loyalty, prudence, and care. INVEST SUISSE is guided by these principles.

### ADVISORS HAVE THE FOLLOWING RESPONSIBILITIES TO THEIR CLIENTS:

- Act in a professional and ethical manner at all times.
- Act for the benefit of clients.
- Act with independence and objectivity.
- Act with skill, competence, and diligence.
- Communicate with clients in a timely and accurate manner.
- Uphold and comply with the applicable rules, governing principles and guideline.

### INVEST SUISSE KEY VALUES FOR SUCCESS:

- Importance of controlled risk management (position sizing)
- Importance of intelligent and timely exits
- Importance of diversification
- Reward to risk multiples to determine expectancy
- Power of low risk entries
- Use of disciplined trading and investment psychology

INVEST SUISSE holds a unique place of trust in the lives of its clients. We undertake and perform our responsibilities with honesty and integrity, which we think is critical to maintaining investors' confidence.

## OUR MARKET WATCH



DUBAI FINANCIAL MARKET



ABU DHABI SECURITIES  
MARKET



OPALESQUE



BLOOMBERG



GOLD BULLION



SAXO RESEARCH



UBS RESEARCH

## OUR MARKET REVIEW



Kuwait Stock Exchange

KUWAIT STOCK EXCHANGE



BAHRAIN STOCK  
EXCHANGE



SAUDI STOCK MARKET



DOHA SECURITIES MARKET



AMMAN STOCK EXCHANGE



GLOBAL MARKET INDICES \  
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