



Our Managed Mandates

Description

The managed Mandates are broadly diversified, mixed investment solutions that invest in the major asset classes: money market, bonds, equities and alternative investments such as non-traditional investment funds and commodities. We work with you to define a suitable investment profile based on your personal situation, preferences, risk capacity and tolerance.

Select your individual investment strategy

In order to provide maximum support in determining the strategic orientation of your portfolio, we offer three global investment strategies tailored to your personal requirements in terms of risk and return.

Investment strategy « conservative »

- Investment objective : stable asset performance through consistent income
- Risk tolerance : moderate

Investment strategy « balanced »

- Investment objective : combination of consistent income and long-term asset growth
- Risk tolerance : medium

Investment strategy « dynamique »

- Investment objective : considerable long-term capital appreciation with low, consistent income
- Risk tolerance : above-average

Special mandates

In the event that our comprehensive range of mandates and combined mandate solutions do not fully meet your needs, we can still find an optimal solution for you. We will develop a mandate specially tailored to your requirements, which takes into account your risk tolerance and investment objectives.

Our special mandates are offered in the reference currencies CHF, EUR, USD.

The investment strategies differ in terms of expected risk and return as described below. Please be aware that losses are possible in any mandate type.

You choose how to invest

Special mandates are designed and managed according to the client's specifications. For example, they allow you to specify asset classes or markets in which you wish to invest your capital. Together with your portfolio manager, you can also define an individual benchmark.

Implementation of the investment strategy

Our mandates allow targeted use of individual securities and/or direct investments. This increases the transparency of the investment decision and allows the focus to be placed on specific areas. However, funds/or fund-like products may also be used for diversifications purposes.

Who are managed mandates suitable for?

Our managed mandates are suitable for clients who seek an actively managed and broadly diversified core solutions based on their personal risk profile.

Our mandates at a glance

Traditional :

- Broadly diversified investment solutions investing in all the main asset classes
- Active management in line with the long-term, global investment strategy of Forward Capital SA and based on the Forward Capital SA investment process
- Rapid and flexible implementation of investment decisions thanks to cutting edge analysis and information systems.

Special :

- Integrated tailored investment solution based on the investment criteria and quality standards of Forward Capital SA
- Allocation adjustments of investments tailored exactly to individual needs
- Active and dynamic management of investments
- Supplemented by promising long-term investment themes