

Independent Consulting for Insurance Companies

- » **Optimal strategic asset allocation in line with regulatory requirements**
- » **Combined know-how of financial markets and actuarial practice**
- » **Extensive peer group comparisons (fees, performance, etc.)**

No matter if your insurance company is specialised in health, accidents, buildings or property, we support you in your investment activities and make sure that your investments are made in line with best institutional practice. In our asset liability studies, we take into account economic as well as regulatory and accounting aspects. In mandate tenders, we pay particular attention to important aspects such as the accounting of bonds according to the amortized cost method or the regulations of the supervisory authorities (FINMA, FOPH, etc.).



Optimal strategic asset allocation
Economic derivation of optimal portfolios based on risk capacity and investment objectives, taking into account the relevant regulation (laws such as VVG and KVG).



Actuarial consulting
Comprehensive advisory from an economic and actuarial point of view (SST, KVG solvency test, etc.).



Sustainability (ESG)
Development of a sustainability concept that is tailored to your needs and can be implemented in practice, e.g. in a workshop with you.



Selection of banks and asset managers
Selection process on our established platform, conducting contract negotiations.



Portfolio check
Independent assessment of your current investments regarding performance, costs and risks.



Investment controlling
Continuous and independent evaluation of the investment results, identification of any need for action, sparring partner for the investment committee.



Fee and performance comparisons
Extensive comparisons with other insurers and investors (over 200 institutional investors with assets of more than CHF 400bn).



Contact
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