

PRESS RELEASE

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Syz Capital white labelling partnership reaches new milestone

Syz Capital's pilot partnership with Banca March, OYSTER BM Alternativos, has reached the €200M mark and sets a positive baseline for future developments of white labelled fund of funds management services.

Launched in October 2019, the tailored product managed by leading alternatives provider SYZ Capital, in partnership with Banca March has reached the symbolic milestone of €200M of assets under management – effectively doubling in a year. The fund has also made, since its October 2019 inception, an annualized return of 5.4% while enjoying an exceptional 1.3 Sharpe ratio, leading its peer group.

Managed by a team led by veteran fund manager Cédric Vuignier, Head of Liquid Alternative Managed Funds, OYSTER BM Alternativos invests in select equity hedge, event driven, macro and relative value strategies with the aim of providing resilience to market sell-offs. “We’ve been particularly strong on a risk-adjusted basis thanks to our actively managed approach. The liquidity terms of the alternative UCITS vehicles have allowed us to be dynamic in difficult environments”, explained Vuignier.

Such rapid growth is the result of an excellent work dynamic between the partner institutions, clear client communication by the front office, as well as the privileged access Syz Capital has historically enjoyed with some of the best fund managers in this space.

Juan Antonio Roche González, member of the Banca March Executive committee, reflects on the partnership: “Alternative investments are the quintessence of the active management in which Banca March deeply believes. This vision came together in 2019 when we agreed to launch a formula with Banque Syz to create a key offering for client portfolios – one that bonds are no longer able to satisfy. This natural partnership, between two family-owned specialists, had the best possible test navigating through the Covid months, when transparency and market insight were essential. The outcome could not be better: bold performance and outstanding AuM. We look forward to the opportunities to come.”

A replicable success story

The white label model has proved to be a great success with growing client demand, allowing each party to focus on their core strengths. Demand has steadily grown and the team's flexibility and quick reaction times have been an additional reason for the competitive edge to become established. With such a strong proof of concept, discussions are already underway to expand the program to other institutions who cannot or do not wish to internalize fund management services but need to meet growing client demand.

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For more information, please contact:

Sherif Mamdouh, Head of Media Relations

Tel.: +41 (0)58 799 41 18

Email: sherif.mamdouh@syzgroup.com

About Syz Group

The Syz Group is a family owned and managed Swiss financial group focused on good long-term investment performance, robust risk management, and personal service for clients. Entrepreneurs for centuries, the group was co-founded in 1996 by Eric Syz who still leads the firm alongside his two sons and a team of industry experts. Stable and secure – the Syz Group holds substantial equity, almost double Switzerland's regulatory requirements.

The group serves clients across four main areas:

- Banque Syz offers private clients a genuine alternative to the traditions of Swiss private banking
- Syz Independent Managers provides the full services of a custodian bank to external asset managers.
- Syz Capital offers investors the opportunity to invest alongside the Syz family in hard to access alternative investments including private markets
- Syz Asset Management primarily invests the assets of Swiss institutional investors in bonds and money market instruments.

Syz clients share the group's long-term view and focus on building sustainable wealth for the future.
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