



Sonnenberg
Wealth Management

**Inspiring investment partnerships
to achieve global goals**



Private Equity Investments in context of SDG's and impact investments

From a private clients perspective

Private Wealth in Switzerland

- Switzerland is the global leader for cross-border private banking with a market share of 25% of global assets under management, CHF 6.6 trillion¹
- In 2016 investments in Swiss sustainable investments (Funds, Mandates & Asset Owners) have risen by 39% to CHF 266.3 billion²

Source:

¹ SSF, 'A Unique opportunity for Swiss Private Wealth Management', March 2017

² Swiss Sustainable Investment Market Report 2017

Requirements from Private clients

- Continuity for their business and family
- Flexibility
- Low volatility: no more 2008 experience (de-risking)
(from our clients, less than 10% of our clients invest in a dynamic portfolio)
- Combined with a positive return
- Positive return oriented instead of benchmark oriented

Advantages of Private Equity/Impact Investments

- No correlation to equity and bond markets
- Therefore lower volatility in the overall investment portfolio
- Combined with a positive return
- And a positive impact on society

Disadvantages of Private Equity/Impact Investments

- Illiquid
- Perceived higher risk compared to normal equity and bond markets
- Negative perception of Private Clients after 2008

How to unlock more potential from Private Clients wealth to invest in PE/Impact Investments to meet the SDGs?

On a product level:

- Build bridges and create partnerships between offer and demand to enhance opportunities
- More liquid PE/impact investment opportunities accessible for Private Clients

On a business level:

- The largest opportunity is at the Private Clients Advisor (Private Banks, EAM's, Family Offices):
Increase awareness at intermediaries dealing with Private Clients on sustainable investment opportunities

How?

Change mind set of Swiss Private Banks and Private Clients Advisors

Contact Information

Sonnenberg Wealth Management AG

Gartenstrasse 19
8002 Zurich
Switzerland

E-Mail: info@sonnenberg-ag.com
Phone: +41 58 680 59 09
Fax: +41 58 680 59 05

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