

SUMUS

CAPITAL

We are a Family Office and a FINMA regulated Asset Manager
Our aim is to offer stable and long-term solutions

OUR STORY

- 2015** • Sumus Capital was founded in Geneva as a **Family Office**, a natural evolution of the trusting relationship between the founding families and the top managers, after years of valid and convincing portfolio management.
- 2016** • 9 months after its creation, Sumus Capital obtains **FINMA authorization** for the management of mutual funds and starts the **Asset Management** business.
- 2017**
- 2018** • Sumus Capital opens the Lugano office and starts the **Private Banking** division.
- 2019**
- 2020** • After 4 years of profitable growth, with the aim of entering a new development phase, the members of the Executive Committee increase their participation in the company's capital to more than 75% through a **management buy-out**.



OUR OBJECTIVES

OUR PILLARS

CLIENT SATISFACTION

- Listening carefully to our clients' needs and maintaining a constant dialogue with them is the basis of our activity and enables us to provide a personalized service that adapts to the clients' changing needs and objectives
- Our aim is to create a trusting relationship that lasts over time and can span generations

EMPLOYEE HAPPINESS

- Our main stakeholders are Sumus' employees
- Professional environment, characterized by integrity, competence, cooperation and friendliness
- The flat internal organization, with a minimal hierarchical structure, creates a particularly efficient, productive and stimulating working environment

BUSINESS PROFITABILITY

- Business focused on clients satisfaction and employees empowerment
- We prefer to focus on long-term solid value creation rather than short-term profitability

ENVIRONMENTAL CONSCIOUSNESS

- We strive to have a positive impact on the environment
- Our aim is to integrate clients' interests, employees' satisfaction and company profitability with respect for the environment

TRANSPARENCY

- Client stewardship and alignment with client's wishes as top priorities
- No inducements nor retrocessions

SOLIDITY

- Authorized and regulated by FINMA
- Strong capital base
- Auditor: KPMG
- Legal counsel: Schellenberg Wittmer

EXPERTISE

- Created by investment professionals who have been working together for over 15 years
- Experienced Asset Management team in Bonds, Equities and Commodities combined with senior Wealth Management professionals

ASSET MANAGEMENT

We built a team of experienced asset managers working together and challenging each other to provide persistent solid performances.

- INVESTMENT STRATEGY & ASSET ALLOCATION
- SUMUS FUND
- ACTIVELY MANAGED CERTIFICATE



WEALTH MANAGEMENT & FAMILY OFFICE

Our goal is to contribute to the creation and preservation of a legacy that will endure for generations, by using our expertise at the service of our clients' current and future objectives and needs.

- WEALTH PLANNING
- PORTFOLIO STRUCTURING
- INVESTMENT ADVICE
- CONSOLIDATED REPORTING
- FAMILY GOVERNANCE

SOME OF OUR CUSTODIANS



OUR TEAM



PAOLO ANASTASI
PARTNER
HEAD OF PRIVATE BANKING



MATTEO ANRÒ
SENIOR ASSET MANAGER



VALÉRIA BAUMANN
COMPLIANCE OFFICER



ALEXANDROS BENAKIS
PRIVATE BANKER



FRÉDÉRIQUE DUBRION
SENIOR ASSET MANAGER



LUIGI LEONE
SENIOR PRIVATE BANKER



STEFANO MALTESE
SENIOR PRIVATE BANKER



VALENTIN MARCHI
INSTITUTIONAL SALES MANAGER



DANAE PARÉS
HEAD OF OPERATIONS
GENEVA



LUCA PARMEGGIANI
FOUNDING PARTNER
CEO



CAMILA RIVAS
ASSET MANAGER



MARCELLA STOPPA
HEAD OF OPERATIONS
LUGANO



ANDREA ZUCCHERI
PARTNER
CIO

— WE BUILD SOLID STRATEGIES —

SUMUS
CAPITAL

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FINMA regulated - SAAM member