

Asset Management for Institutional and HNWI Clients

PK Assets

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## Profile

PK Assets AG was founded on 1 June 2007 by Hans-Peter Ruesch and Jürg Lutz.

PK Assets AG is an asset manager for institutional and HNWI clients. The organization is kept lean, decision-making paths are short. Our customers have the benefit from the team's many years of experience and excellent networking.

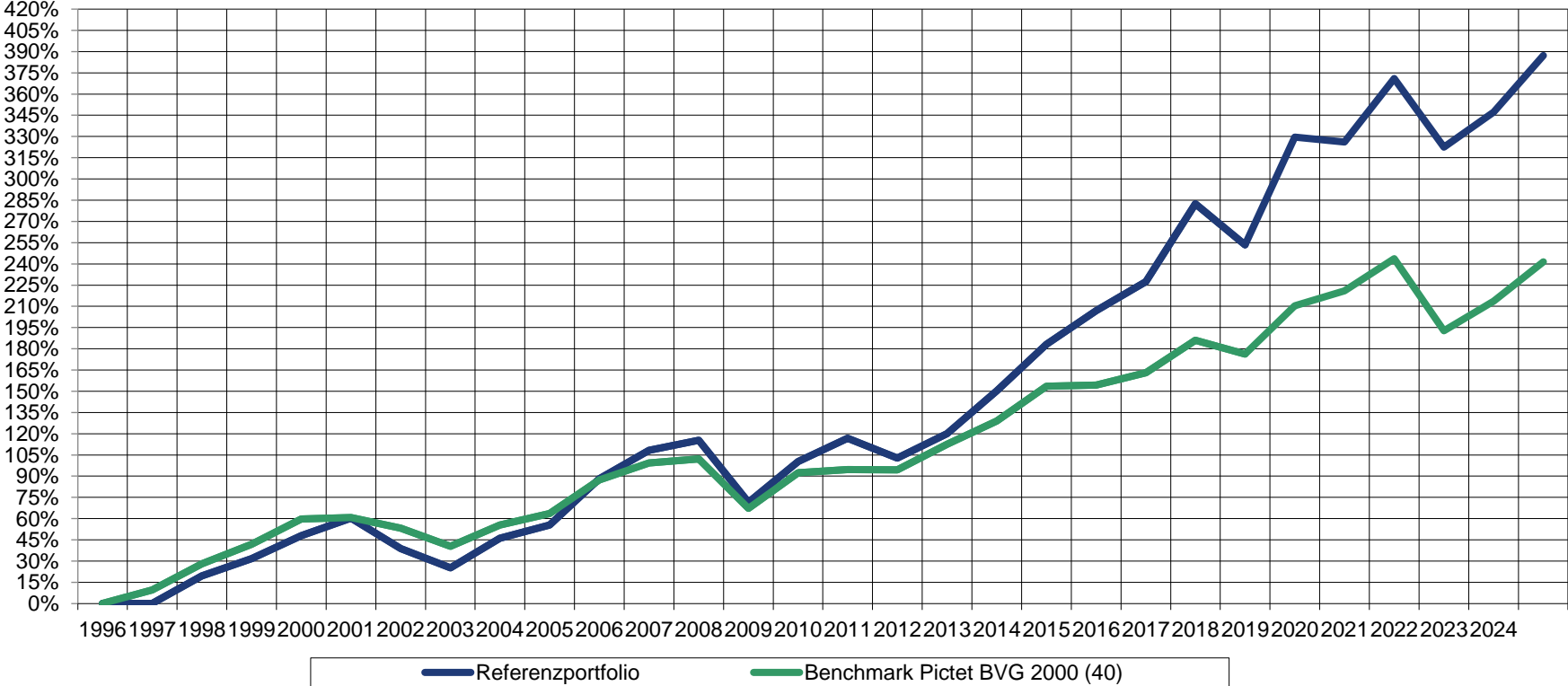
The results are sustainable.

We offer responsible, honest, active management with simple products and do not use industrial, non-transparent and therefore expensive asset management.

The focus is on the customer and his needs.

## Track Record

Mixed mandate  
Current performance 09/1996 - 09/2024  
Reference Portfolio - Reference Benchmark



## Services

- Mandates "mixed" (cash, bonds, shares)
- Mandate Bonds in CHF and foreign currency
- Mandates Equities Switzerland and World
- Mandate Treasury
- Access to Private Equity as Limited Partners

## Investment Philosophy

### **Indepent**

PK Assets is independent and aligns its competencies 100% with customer goals and needs. We are independent and work with external specialists with connections to global financial markets and investment products.

We make recommendations for our clients and use the best products and individual stocks in the respective market segments.

### **Holistic**

PK Assets aligns the investment universe globally, favouring individual stocks. Asset management takes place in the context of the client's situation.

### **Structured**

PK Assets has structured decision-making processes based on a combination of top-down (macro, region and sector strategy) and bottom-up (stock and product selection).

## Investment Philosophy

### **Active**

active investment style with a clear position in all asset classes and currencies. We use index-oriented (passive) investment instruments where rapid implementation in tactical investment policy is required.

### **"Plain Vanilla"**

PK Assets pursues a clear "back-to-basics" strategy. Alternative systems are only used if the customer expressly requests.

### **Sustainable**

PK Assets strives for long-term client relationships and is committed to the highest ethical and professional standards of the Swiss Financial Analyst Association (SFAA) and the CFA Institute (ICFA).

### **ESG**

PK Assets has access to figures from the main ESG providers and, at the client's request, can benchmark and manage portfolios using an algorithm developed in-house.

## Know-how: Assumption of comprehensive decision-making authority

- We take over the allocation decisions in our mandates (always based on the investment guidelines and regulations)
- We have built up extensive know-how to take over the comprehensive decision-making authority
- We currently have >500 corporate credit models, >40 country credit models and currency models for >20 currency pairs
- We are constantly developing our models and adapting them to the changing environment; Data supplier Bloomberg
- We have an excellent network for determining earnings expectations and other equity parameters

## The Team



### **Hans-Peter Ruesch**

Managing director and portfolio manager with many years of experience in the field of equities, bonds, currencies, treasury, real estate



### **Jürg Lutz**

Managing director and portfolio manager with many years of experience in the field of bonds, currencies



### **Judith Marty**

Director with many years of experience in the field of administration, controlling and risk management



## Contact

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