



PRESS RELEASE

02.03.2020

BILANZ ranking: Tareno Ltd is asset manager of the year

Every year, highly respected Swiss financial magazine BILANZ, in collaboration with firstfive, names the best asset manager in Switzerland. Earning this title requires an outstanding performance across different risk categories in comparison with 100 rival portfolios. The selection process for 2019 (12-month period) was the first one we had taken part in, and we were chosen as Switzerland's best asset manager straight away.



Tareno came out top in all of the four risk categories analysed. That makes this award particularly important to us.

Assessment procedure

The assessment procedure is based on real client portfolios, rendered anonymous, that the asset managers submit along with all their transaction documentation. These are analysed by firstfive, an independent specialist controlling and ranking provider. The deciding factor is the performance of a portfolio in relation to the risk entered into, known as Sharpe ratio. This risk is measured by the fluctuations in the value of the portfolio. BILANZ draws up a ranking in four risk categories (conservative, balanced, moderately dynamic and dynamic).

Why Tareno Ltd: reliable and independent

Our top ranking in this stringent assessment procedure demonstrates that our philosophy of active, independent and long-term asset management for our clients has proven its worth. The investment solutions that won us this award are based on our in-house valuation model. In this we identify companies that offer the most attractive combinations of features in terms of our analysis of fundamentals, ESG criteria and momentum. All our asset management clients benefit from this successful model, irrespective of the strategy they choose.

Important event

Being named asset manager of the year is something very special for our clients and staff. Our corporate culture is down to earth, but this top achievement makes us very proud. Our top ranking is proof for our esteemed clients that they are in the right place.

Read the BILANZ article (in German) of 28 February 2020 here: [PDF](#)



TARENO

Tareno Ltd

Tareno Ltd was founded in 2000 as a public limited company and is owned by private shareholders. With over thirty employees and client assets under management of over CHF 2.5 billion, it is one of the largest independent asset management companies in Switzerland. With an office in Zurich and a subsidiary in Luxembourg, Tareno is present in important financial centres in Switzerland and Europe. Tareno is directly regulated by FINMA (Swiss Financial Market Supervisory Authority).

Contact



Sybille Wyss is deputy CEO and Chief Investment Officer (CIO) of Tareno Ltd. As CIO she is responsible for Tareno's investment policy. She has been co-fund manager of the Tareno Global Water Solutions Fund since the launch of the fund and fund manager since September 2018. She holds a Bachelor in Business Administration from the University of Applied Sciences North-western Switzerland FHNW and has worked for Tareno since 2004.

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