

Vontobel launches first Swiss digital active wealth management offering in the market

- **Vontobel expands its range of wealth management products and services for wealthy clients with its own digital active wealth management offering ‘Volt’.**
- **Vontobel’s Digital Investment Solution Platform also enables partners of Vontobel to offer digital customizable investment solutions for their clients.**
- **Raiffeisen Switzerland will use Vontobel’s Digital Investment Solution Platform for its own digital wealth management offering for retail clients from spring 2020.**

With Vontobel Volt, Vontobel has become the first Swiss wealth manager to give wealthy clients digital access to the investment expertise of a global active wealth and asset manager. Complementing the traditional active wealth management offering, Volt enables clients to experience and benefit from Vontobel’s comprehensive value proposition in a new way. In future, Vontobel clients will be able to use the intuitive new Volt app on their Smartphones to invest in actively managed financial investments and to individually customize their personal portfolio.

“Vontobel Volt adds a new digital dimension to our successful active wealth management offering. The new technology allows our wealthy clients to make direct, individual use of our investment expertise from any location at any time and to customize their portfolio. Volt complements our successful range of wealth management products and services and will create additional growth potential. Our clients can have confidence that every aspect of Volt – from the service offering and investment expertise to security – is 100% Vontobel,” stated Georg Schubiger, Head of Wealth Management.

Vontobel Volt clients can invest on the basis of Vontobel’s proven 3α Investment Philosophy, like clients with traditional portfolio management mandates. The 3α philosophy centers on the conviction that active management can create additional value and it is based on three main pillars: Broad diversification, medium- and long-term investments in investment themes developed by Vontobel experts, and the use of short-term market opportunities via selected individual stocks. Using the investment themes, Volt clients can define their own individual investment priorities. In line with the 3α Investment Philosophy, Volt clients can invest in a globally diversified portfolio constructed according to their personal risk profile.

Vontobel Volt informs clients about current market events, attractive new investment themes and changes in their portfolio. It also provides full transparency about individual investment products and their performance at all times.

Portfolio risk monitoring is performed by a new digital risk management and monitoring system developed by Vontobel. Experts at Vontobel have the ability to make adjustments to portfolios at any time based on market conditions. For the execution of transactions and the safe custody of assets, clients benefit from Vontobel’s guarantee of quality and its stability as an established Swiss wealth and asset manager.

With Volt, clients profit from the expertise and solidity of a leading Swiss wealth and asset manager combined with the user experience and customization options of a contemporary digital offering.

From today, Volt will be available to existing Vontobel clients in Switzerland in addition to the current wealth management offering. Volt is also aimed at new portfolio management clients in Switzerland. Its target group includes wealthy private individuals who are seeking solid diversification options for their personal portfolio. Since the start of the year, Vontobel employees in Switzerland have successfully tried out the new digital active wealth management offering.

Vontobel is also making Volt’s underlying Digital Investment Solution Platform and the related investment and technology expertise available to other financial services providers who want a comprehensive Swiss alternative and a leading solution from both a content and technology perspective.

Raiffeisen Switzerland will be the first partner to offer its own digital wealth management solution based on Vontobel’s Digital Investment Solution Platform. Raiffeisen’s solution will be specially tailored to the needs of more than 3.5 million Raiffeisen clients and Swiss retail clients with a lower volume of assets. In future, they should be able to invest via digital channels in a broadly diversified investment portfolio that is aligned to their individual risk profile, as well as having the option of defining their own individual investment priorities. The offering is due to be launched in spring 2020.

“With an attractive portfolio management mandate, we can give our broad clientele access to highly professional investment knowhow. As a cooperative banking group, we consider it very important to support as many Swiss as possible in their wealth planning and to give them long-term savings opportunities with securities,” stated Heinz Huber, CEO of Raiffeisen Switzerland.

“Vontobel has – with its Digital Investment Solution Platform – set itself the goal of digitally rethinking active wealth management for private clients while guaranteeing the same high level of quality. Initial reactions show that our own offering, Volt, and our B2B offering meet client expectations and therefore satisfy our own requirements. We have thus created a further opportunity for growth in our Swiss home market and our focus markets. We offer a pioneering solution that allows clients to experience portfolio management in digital form. In particular, we are delighted that Raiffeisen, one of the leading Swiss banks with whom Vontobel already has a long and successful collaboration in Asset Management benefiting all parties, will have its own digital wealth management offering in future that will be based on the Vontobel platform,” stated Zeno Staub, CEO of Vontobel.

The Digital Investment Solution Platform and Vontobel Volt have been developed internally by Vontobel using components from technology partners. To achieve this, Vontobel assembled a cross-functional team of digital experts and experienced relationship managers as well as investment specialists. These initiatives demonstrate Vontobel's strategy of continuously enhancing the benefits it offers clients through innovation and a long-term investment policy.

Note to editors: Further information about Vontobel Volt is available at: <https://volt.vontobel.com>

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Vontobel

At Vontobel, we actively shape the future. We create and pursue opportunities with determination. We master what we do – and we only do what we master. This is how we get our clients ahead. As a globally operating financial expert with Swiss roots, we specialize in wealth management, active asset management and investment solutions. We empower our employees to take ownership of their work and bring opportunities to life. Because we are convinced that successful investing starts with assuming personal responsibility. We relentlessly question the achieved, striving to exceed the goals and expectations of our clients. The registered shares of the Vontobel Holding AG are listed on the SIX Swiss Exchange. The Vontobel families' close ties to the company guarantee our entrepreneurial independence. We consider the resulting freedom an obligation to assume social responsibility as well. As of December 31, 2018 Vontobel held CHF 247.3 billion of total client assets. Around the world and in our home market, we serve our clients from 26 locations.

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