



ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

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Excellence Winners 2023



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A Flexible Approach, Strategic Convictions And Agility



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Founded in 1995, Apricus Finance is a family-owned external asset manager delivering first class, discreet Asset Management & Family Office services to U/HNW individuals and families.

Each client is unique, with a personalised wealth management solution that evolves over time, mirroring the client's own personal journey. For family office clients, this extends to a personalised investment team, supporting clients with a wide range of services: from help setting up legal structures, to undertaking due diligence on external providers, from helping determine key wealth touch points and objectives, to corporate governance advice and next generation structuring.

Apricus Finance partners with 15 banks across four jurisdictions: Switzerland, Singapore, Liechtenstein and Luxembourg. Supported by our advanced IT platform, TeamWork and other proprietary reporting tools, we provide robust performance, risk & cost analysis, effective cash-flow management, and professional accounting & audit reporting.

Our investment professionals are known for their vast experience, flexibility and agility, combining long-term wealth protection with innovative and creative solutions. The keys to our success are a combination of our market-conscious approach, strategic and thematic convictions, coupled with a flexible and opportunistic investment DNA.

This is what sets us apart, because we are leading the way in External Asset Management by evolving the historical mould. How? Asset managers, be they banks or independents, are highly aware of, and thus closely aligned to, market recognised benchmarks – be they the MSCI World Equity Index or the Bloomberg Global Aggregate Bond Index, to name those most commonly used. Matching the indices performance and ideally out-performing, with a little alpha, is considered a success. What happens, though, if we believe that a constituent of an index is likely to dramatically underperform? Do we slavishly follow it? Well, no, this is where the founding pillar of our investment process comes in – our market-conscious approach.

Witnessing an increasing “decoupling” with European equities, Apricus Finance was heavily underweight US equities (and remains so), preferring a markedly over-weight position in European equities. Along with a more targeted, “European Recovery” strategy, this has resulted in meaningful outperformance into 2023 to date.

Firstly, targeting key “*thematics*”, that we believe will be the focus of future market growth and secondly, having a flexible, nimble and tactical approach to market changes. For example, seeing historic discounts to NAV in Listed Family Holding Companies. Being global leaders in investing in such companies, we have doubled exposure in this segment. This ability to adapt, quickly and decisively, sets us apart from our competitors.

Actively evolving the market, is not done to be different though, it is a by-product of our instinctive style. Being family owned, we work with and for families, ensuring that clients receive the attention and service they deserve - as a member of the Apricus “Club” - with everything dedicated to ensuring their best interests are met, time and again.

Families, with families, for families



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WEALTH MANAGEMENT

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