NPB
Neue Privat Bank AG

Private Banking is a People's Business

Asset Management

—

Zurich, June 2025

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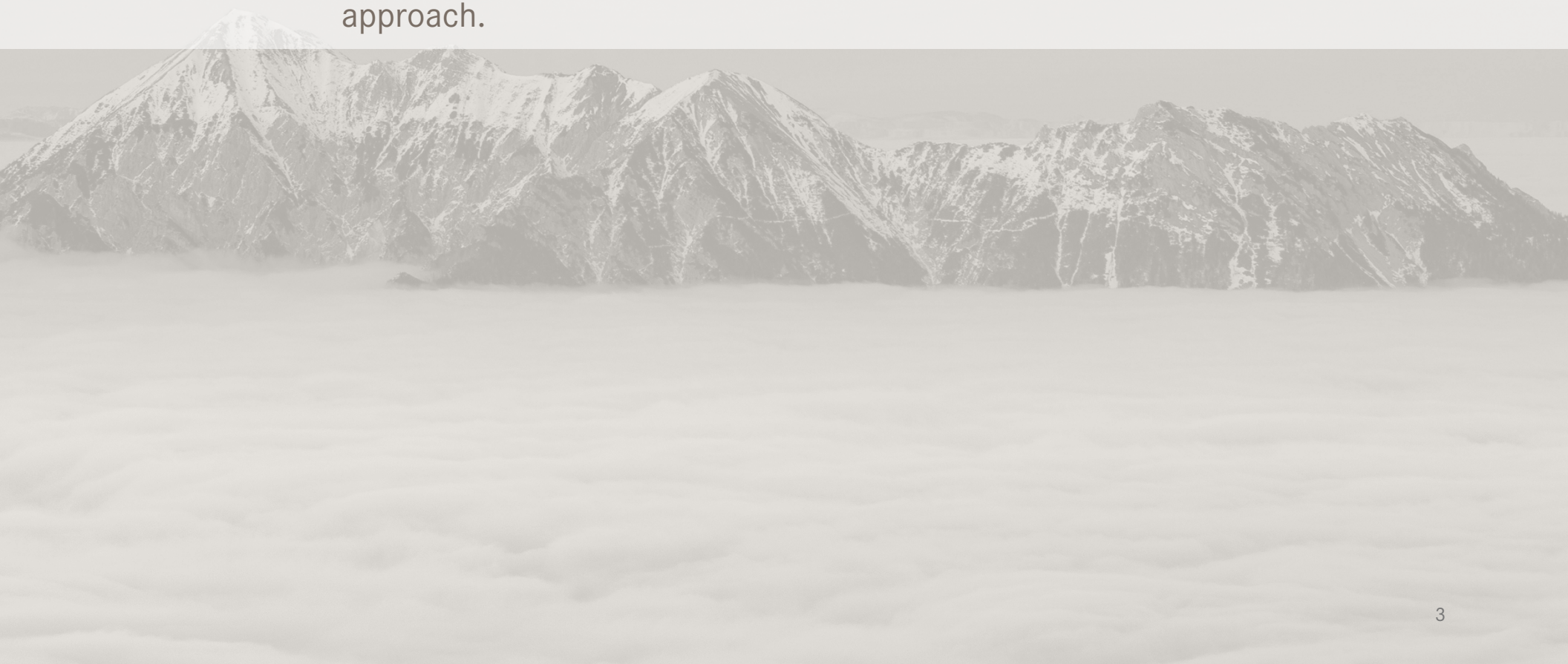
Asset Management

“Our portfolios are carefully constructed via an elaborated multi-step process, including several idea generation sources, which then are exposed to rigorous quantitative filters, finally overlayed with a robust risk management approach.”



Investment Philosophy

What Are Our Goals?

Our Guiding Principles
Price leads narrative. Making money over being right. Simplicity is the ultimate sophistication.

Our Unfair Advantage
No own products, i.e. access to true best-in-class open-architecture, with no sales objectives.

Our Promise
Risk-adjusted returns tailored to your personal preferences, requirements and risk capability.

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NPB Investment Team

André Huwiler
Chief Investment Officer

Tim Pfister
Deputy Head Asset Management, Advisory & Execution

Suna Dügünyurdu
Asset Management, Trading

Our Commitment is Your Success

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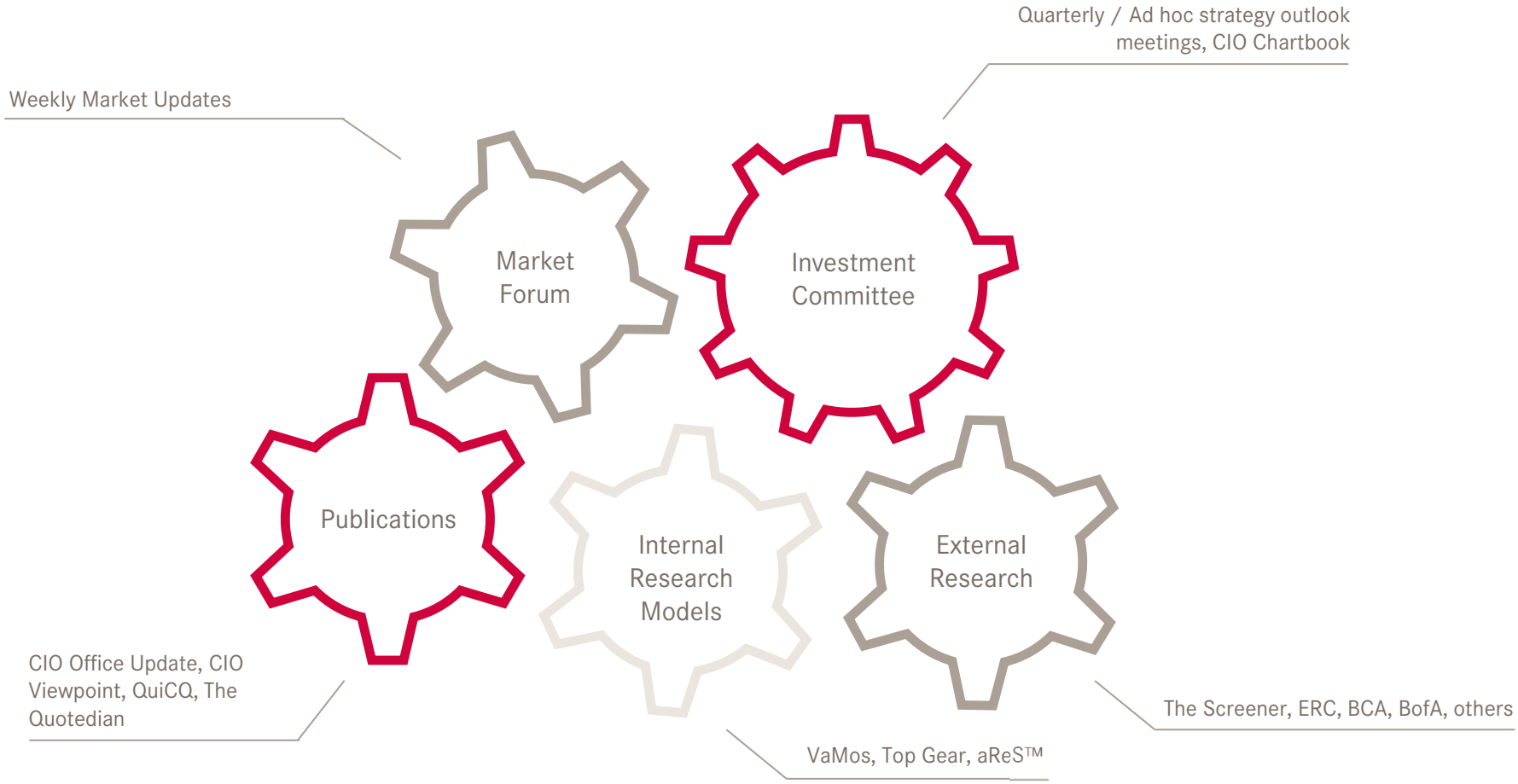
Research and Knowledge as Key Factors



Our Asset Management Services

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Service Catalog

Portfolio Services

NPB Focus List:
Includes a diverse selection of fundamentally analyzed equities, fixed income instruments, funds and ETFs, all of which are reviewed and adjusted on a regular basis.

DPM-Portfolios:
Our Core Portfolios are available in four currencies (CHF, USD, EUR and GBP), providing a fundamentally diversified structure.

Advisory Services

Portfolio Review:
In-depth portfolio analysis with expert guidance to optimize investment opportunities.

Custom Portfolios:
Personalized portfolio service, meticulously tailored to meet client-specific financial needs.

Proposals:
Personalized proposals crafted to align with client-specific objectives.

Our Investment Team executes portfolio construction and analysis, offering not only a top-tier asset management approach but also a wide variety of advisory services.

A Glimpse of Our Services

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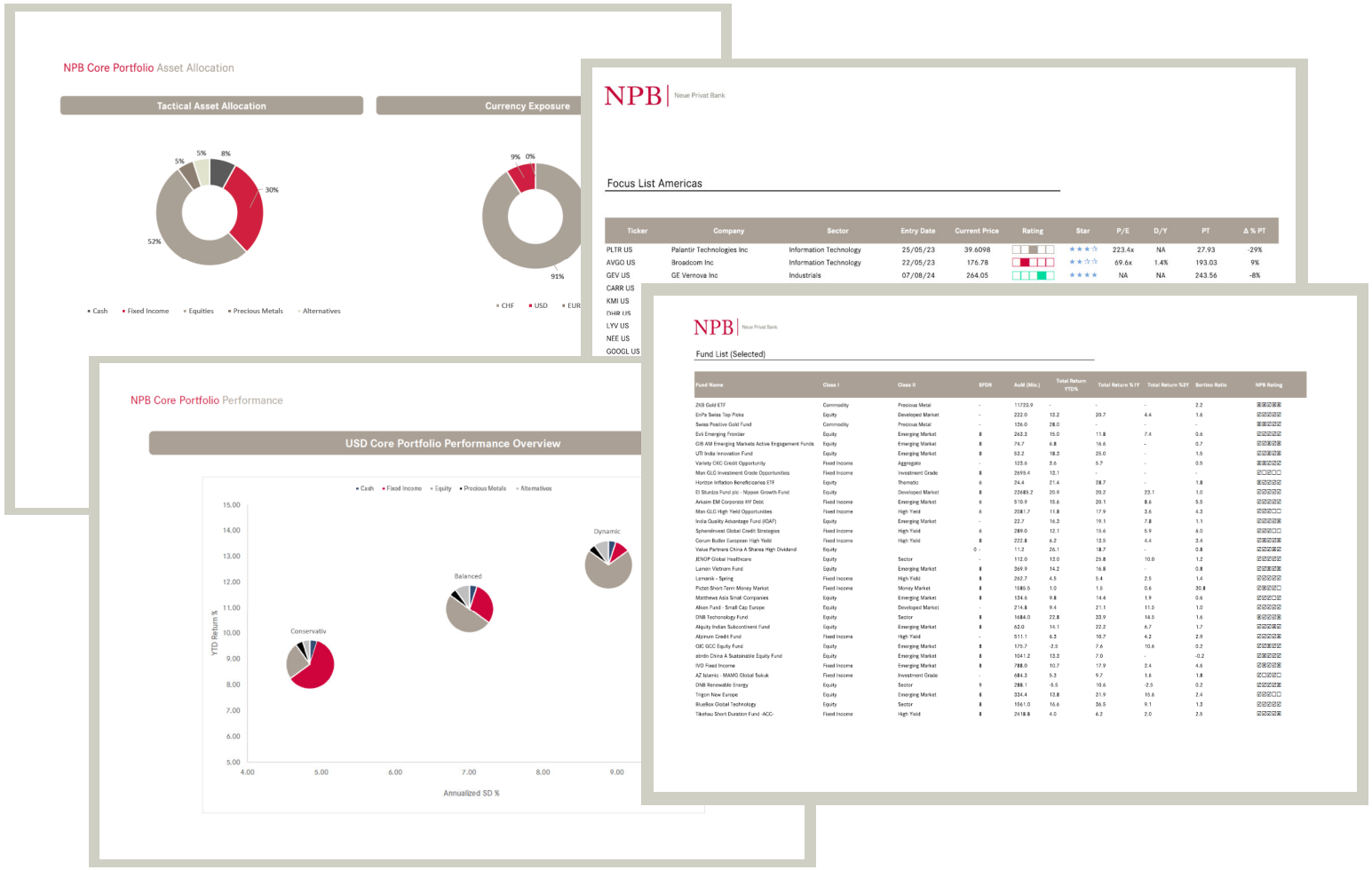

Our Portfolio Construction

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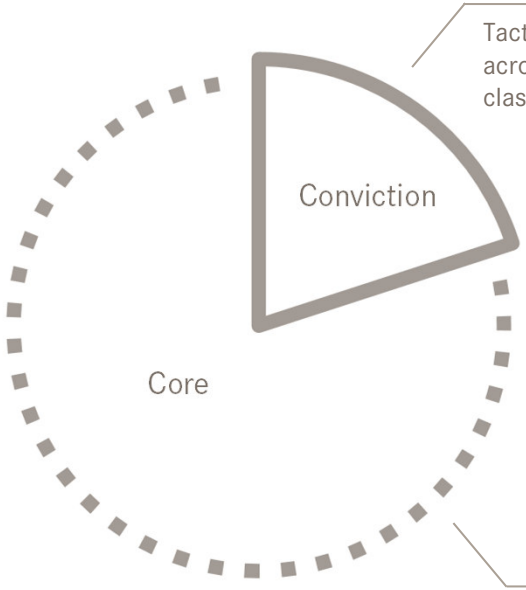
A Solid Foundation, Balanced With Flexibility

- Our portfolio construction process starts by creating exposure in the core asset classes via cost-effective instruments such as index-tracking ETFs.
- To these asset classes we add our high conviction investments, mostly via specialized active managers, but also using individual stock and bond picks.
- All the above always prioritizing your personal investment needs. Benchmarks are of secondary consideration only.

Client needs & objectives

Global Investment Committee

Market information



Tactical opportunities identified across a diverse range of asset classes.

Strategic core assets with a diversified structure to provide steady long-term growth and stability across market cycles.

NPB Stock Selection Approach (1/2)

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Methodology

CORE PRINCIPLES
- Recommendations are largely macro-environment independent.
- Recommendations are market regime (bull, bear, kangaroo) independent.
- Each regional focus list is treated as a stand-alone portfolio.

GOAL
- Generate returns that exceed the relevant benchmark/industry peer group through a disciplined investment approach.
- Prioritize absolute return as a key driver of overall portfolio performance and risk adjusted outcomes.

STRATEGY
- Research-driven framework integrating idea generation, screening and request-based analysis, anchored by our focus list (VaMoS) with verification from Morningstar Direct.

MONITORING
- Continuous updating of equity list on a weekly basis.
- The positions carry soft- and hard stop losses and are adhered to (see next slide).

REGIONS				
	S&P Global 1200 (SPGLOB)	S&P Global 1200 (SPGLOB)	S&P Global 1200 (SPGLOB)	Swiss Performance Index (SPI)
	Focus Americas	Focus Europe	Focus Asia	Focus Switzerland

NPB Stock Selection Approach (2/2)

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Robust risk management strategy

Soft-Stop

-15% OR relative underperformance to sector >10%

- Comprehensive analysis of investment case including competitive positioning.
- Evaluating stock's relative strength against both the broader market and its sector to identify anomalies and trends.
- Monitoring key technical indicators, such as support zones to assess potential entry or exit points.

Hard-Stop

-25%

- Initiate an exit or comprehensive reassessment if the investment declines by more than 25% from the entry price, ensuring alignment with risk management principles and portfolio objectives.

Best Practice Approach
Implementing flexible stop-loss mechanisms that adapt as stock prices rise, securing profits maintaining downside protection.

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