ASSET ALLOCATION

HIGH-YIELD INVESTMENT STRATEGY

Rough allocation according to the risk profile
First, the rough allocation is based on the risk profile of the institutional investor (result of an ALM study).

Transparently derived fine allocation
Fine allocation with high-yield asset classes is determined on the basis of fundamental economic return and risk considerations.

Proprietary forecast database
Our Augur forecast database offers the foundation for strategy consulting.
Fundamental forecasts derived from our own research form the core of these activities. It is also possible to access the forecast consensus of market-leading banks and asset managers.

YOUR BENEFITS, OUR PROMISE

Optimisation of return/risk characteristics
Thanks to our fundamental economic approach, you receive an investment strategy that is transparently derived and profitable, with balanced risk positioning that goes beyond volatility.

Clear picture of market assessment
The fundamental, transparent derivation of forecasts and the three forecast sources allow for a detailed and broad-based discussion, providing a clear understanding of the return and risk characteristics of the asset classes.

INTERESTED?

Dr. Ueli Mettler
Partner
ueli.mettler@c-alm.ch

REFERENCES

Markus Leuthard
Vita collective foundation
„c-alm makes reliable and well-founded allocation recommendations based on its Augur fundamental forecasts."

Stefan Beiner
Publica
Faced with an assessment request concerning specific investment segments, c-alm gets back to us with a clearly communicated second opinion."