



UNION BANCAIRE PRIVÉE

Press release

Union Bancaire Privée strengthens its Small and-Mid Cap franchise with the launch of a Global SMID Cap Equity strategy

Geneva, 11 March 2021

Union Bancaire Privée, UBP SA (“UBP”) is building up its small- and mid-cap (SMID) expertise with the launch of a **global SMID-cap equity** strategy, managed by UBP’s partner Bell Asset Management. This launch marks an important milestone in the strategic partnership established between UBP and the Australia-based asset manager.

Bell Asset Management is a world-class boutique equity manager with a track record of nearly two decades in selecting global SMID stocks. It employs a bottom-up, fundamental, ‘Quality at a Reasonable Price’ approach, with extensive research and ESG expertise across the SMID spectrum.

The new solution focuses on liquid SMID companies in developed countries. It will provide equity investors with efficient diversification to complement a larger-cap allocation, through differentiated return drivers and cheaper growth. This is especially beneficial in the current environment where the balance between fundamentals and valuations is paramount in portfolio construction.

Commenting on the launch, **Nicolas Faller, Co-CEO Asset Management at UBP**, said: “This is an opportune moment to consider equity diversification through the high-potential SMID-cap segment. We are excited to bring our cooperation with Bell Asset Management to the next level and we are proud to reinforce UBP’s SMID-cap franchise alongside a partner with such long and proven expertise in that space.”

Ned Bell, CIO at Bell Asset Management, added: “We are thrilled to build on our partnership with UBP through the launch of this new strategy. Our ‘Quality at a Reasonable Price’ investment approach, combined with our imbedded ESG philosophy, offers investors a unique exposure to an exciting component of the broader global equity market. After what has been a difficult period for SMID-cap companies in 2020, we feel that earnings will recover materially in the next few years.”

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About Union Bancaire Privée (UBP) – www.ubp.com

UBP is one of Switzerland’s leading private banks, and is amongst the best-capitalised, with a Tier 1 ratio of 27.7%. The Bank is specialised in the field of wealth management for both private and institutional clients. It is based in Geneva and employs 1,812 people in over twenty locations worldwide; it holds CHF 147.4 billion in assets under management. (All figures as at 31 December 2020).

About Bell Asset Management – www.bellasset.com.au

Bell Asset Management is an Australia-based, independently owned boutique equity manager focussed on delivering consistent performance outcomes for nearly two decades under the leadership of Chief Investment Officer Ned Bell and his investment team. Bell Asset Management’s investment philosophy is grounded in the belief that high-quality companies will outperform over the long term and that all potential investments should be considered on the basis of their ‘quality’ and ‘valuation’ attributes. Bell Asset Management aims to deliver consistent performance outcomes and to provide superior service to its clients.



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