

Wealth Managers for Today's World.

BUILT FOR CLIENTS

In traditional banking, clients are often treated like distribution channels.

We believe there is a better way. One where performance, integrity, & client alignment come first.

At **RJ**, we are fully independent, work only with best-in-class partners & put your interests at the core of everything we do.

NO POLITICS. NO CONFLICTS. JUST RESULTS.

Independent by Design

Open-architecture investment platform, free from product constraints & institutional bias.

Aligned with Our Clients

Owned by the partners, ensuring complete alignment of interests.

Robust & Reliable

FINMA-regulated wealth manager, founded in 2012, managing USD 2bn in assets.

Performance Focused

Active asset allocation, disciplined implementation & continuous portfolio monitoring across cycles.

Transparent & Connected

Seamless access to your Relationship Manager and consolidated real-time portfolio visibility.

INVESTMENT STRATEGIES

Asset Allocation

Strong macro focus & understanding

Successfully navigated various economic cycles

Implementation

Rigorous selection process

Thematics identification to capture trends

Premium access to research (Goldman Sachs, JP Morgan, UBS, Kepler, Exane, Vontobel)

Network

Strong relationship with major fund managers

Constant reevaluation with benchmarks

Leverage clientele expertise & know-how

2025: A YEAR OF STRONG PERFORMANCE

Performance Across In-House Strategies

2025: EQUITIES

GRAND RECOVERY (USD)

↗ **+61.28%** Focused on sectors which suffered losses & still suffer from rerating/outflow or any other events & are potentially in a recovery phase.

DISCOVERY (CAD)

↗ **+19.05%** Focused strategy targeting North American oil & gas small & mid-cap companies.

2025: FIXED INCOME

SHORT DURATION (USD)

↗ **+6.65%** Fixed Income short duration strategy (24-months average duration)

Performance of a Diversified "Balanced" Portfolio

2025: KEY HIGHLIGHTS

↗ **+19.10%** average performance in USD

↗ **+10.50%** average performance in CHF

↗ **+13.49%** average performance in EUR

Looking Ahead

» With a growing client base, expanding capabilities & a disciplined investment process, **RJ Management** enters 2026 with confidence & conviction.

Onward to **2026**