



WEALTH MANAGEMENT AG

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VT Wealth Management focuses on entrepreneurs from the Alpine region

The Swiss asset manager VT Wealth Management has just launched an Entrepreneur Equity Note. It focuses on investments in companies controlled by a stable shareholder and located in the Alpine region.

The Entrepreneur Equity Note invests heavily in companies from the Alps and neighbouring regions. The majority of companies are controlled by a family, their founders or entrepreneurs. They each have a market capitalization of at least CHF 100 million and are selected based upon momentum and fundamentals. State values, financial stocks, commodity producers and early-stage biotech companies are excluded.

George Alevrofas, CIO of VT Wealth Management, is confident that these selection criteria will deliver the desired results: "The analysis shows that focusing on companies with a stable shareholder core has been highly successful in a broad-based portfolio over the past few years. We are confident that this approach will continue to outperform over the next few years while providing much-desired stability in more troubled times. "

The current portfolio structure has delivered a return of 33.9% over the past 12 months. Since September 2013, the cumulative performance has been 378.4%. Investment is currently heavy on information technology securities, which account for 60% of the portfolio. Consumption accounts for 20%, industrials for 14%. The portfolio comprises a total of 60 titles.

The dividend yield is 1.4% and is fully reinvested. Volatility is reported at 11.6%. The price / earnings ratio is 27.4, the price / book ratio 4.2 and the price / cash flow ratio 19.2. The management fee is 1.5%. An annual return of more than 3.5% results in an additional performance fee of 20%. The minimum investment is 100,000 euros.

About VT Wealth Management

VT Wealth Management AG was founded in 2008 by the two recognized financial specialists Thomas Fedier (Chairman of the Board) and Joseph A. Belle (Member of the Board of Directors) and is owned by the Board of Management. Today, VT Wealth Management AG is headed by Sacha Fedier (CEO & Partner) and employs 25 people. They represent ten different cultures and languages, all have many years of experience in the financial market and a high level of education. VT Wealth Management has set itself the goal of combining the best of two worlds: the relevant values of traditional private banking with the use of state-of-the-art methods

and means. VT therefore stands for vision and tradition. The company fully believes in the Swiss financial market and therefore has its headquarters in Zurich.

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