

Media information

Baloise Asset Management acquires stake in Tolomeo Capital

Basel, 27th July 2020. As part of a strategic partnership, Baloise Asset Management is acquiring a stake in Zurich-based asset manager Tolomeo Capital AG. With this transaction, Baloise Asset Management will further strengthen its position as one of Switzerland's leading rule-based asset managers. In addition, it will exploit synergies and complementary capabilities in areas such as automated investment solutions and alternative investments.

In Tolomeo Capital, Baloise has now found a further partner to help it address the future challenges facing data- and technology-based asset management. Tolomeo Capital was founded in 2011 and combines nearly a decade of experience in fully automated asset management with the development of data-driven and rule-based investment strategies in liquid asset classes.

Baloise Asset Management has been using rule-based investment solutions successfully in the market for many years and is highlighting their importance with this strategic partnership. The cooperation is also a response to growing demand from institutional investors for innovative, transparent and cost-effective investment solutions.

“The focus of this strategic partnership is not only on the collaborative development of products and solutions. It also promotes know-how sharing in the field of rule-based investing and associated activities such as risk management and investment operations. Going forward, this will enable us to offer our customers solutions that satisfy their needs even better,” explains Matthias Henny, CIO of the Baloise Group and Head of Baloise Asset Management.

Tolomeo Capital derives its strength not only from its expertise but also from its proprietary technologies. These investment and risk management systems make it possible to develop fully data-based investment strategies and to manage these in a completely automated manner.

Ivan Popovic, CEO of Tolomeo Capital, adds: “We are confident that combining our capabilities and technologies with those of Baloise Asset Management in this partnership will help us to jointly establish ourselves in the market as a reliable and competent service provider.”

Baloise Asset Management holds a minority stake in Tolomeo Capital.

About Tolomeo Capital

Tolomeo Capital was created in 2011 as a spin-off from one of the largest institutional family offices in Switzerland. It focuses on rule-based and quantitative investment strategies. The company has built a cutting-edge proprietary tech infrastructure that allows it to control every detail of the investment process from start to finish. This enables it to translate new investment concepts into fully automated investment strategies. Tolomeo Capital is regulated by the Swiss Financial Market Supervisory Authority (FINMA) and licensed as an asset manager of collective investment schemes.

Further information

- Media information at www.baloise.com
- www.tolomeo-capital.com
- www.baloise-asset-management.com

About Baloise Asset Management

Baloise Asset Management Schweiz AG has been in existence as an investment adviser and asset manager ever since the Corporate Division Asset Management (KB AM) was founded in 2001. Baloise Asset Management (BAM) meets the growing needs of the Group and of third parties for high-quality financial products and expert portfolio management. The Baloise pension investment foundation (BAP) was founded in 1995 for the management of funds in connection with Pillars 2 and 3a of the Swiss social security system. Luxembourg-based SICAV Baloise Fund Invest (LUX) (BFI) was founded in 2001 in order to offer proprietary fund solutions in Baloise's retail business, while Baloise Immobilien Management AG commenced operations in 2018.

Data protection

We take data protection very seriously at Baloise. Following the implementation of the new data protection legislation, we would like to inform you that we maintain your contact details (provided by you or publicly accessible) in our database in order to be able to send you our media releases. Should you wish to unsubscribe from the newsletter, please click on the link at the end of this media release. Your data will then be deleted from our database.

Contact

Baloise Group, Aeschengraben 21, 4002 Basel, Switzerland

Website: www.baloise.com

Email: media.relations@baloise.com / investor.relations@baloise.com

Media Relations: Tel: +41 (0)58 285 8214

Investor Relations: Tel: +41 (0)58 285 8181

The Baloise Group is more than just a traditional insurance company. The changing security, safety and service needs of society in the digital age lie at the heart of its business activities. The 7,600 or so employees of Baloise therefore focus on the wishes of their customers. The best possible customer service, combined with innovative products and services, makes Baloise the first choice for people who want to feel 'simply safe'. Located at the heart of Europe, with its head office in Basel, the Baloise Group is a provider of prevention, pension, assistance and insurance solutions. Its core markets are Switzerland, Germany, Belgium and Luxembourg. In Switzerland, with Baloise Bank SoBa, the Group also operates as a specialised financial services provider, offering a combination of insurance and banking services. The Group offers innovative pension products to retail customers throughout Europe from its competence centre in Luxembourg. Baloise Holding Ltd shares are listed in the main segment of the SIX Swiss Exchange.