

SAMBA

Presentation

Feb 2025

Introduction



Shea Weiss

Partner since 2023
Private Markets background
Owns a truffle orchard



Matthias Lehmann

Partner since 2022
Private Banking background
Would love to have his own vineyard – so far just drinking good wine.

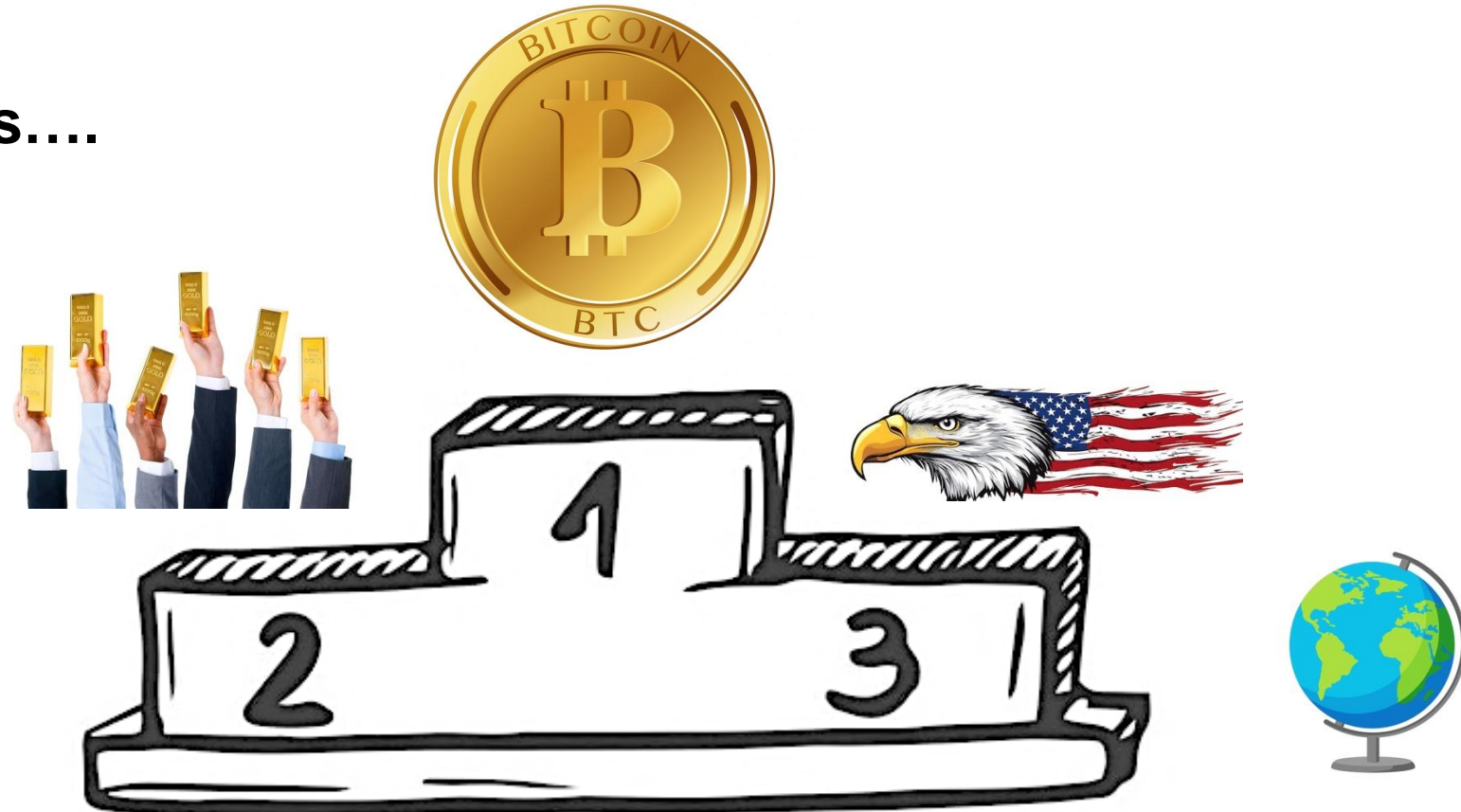
2024 Asset Class Performance: The Year in Review

And the winner is....

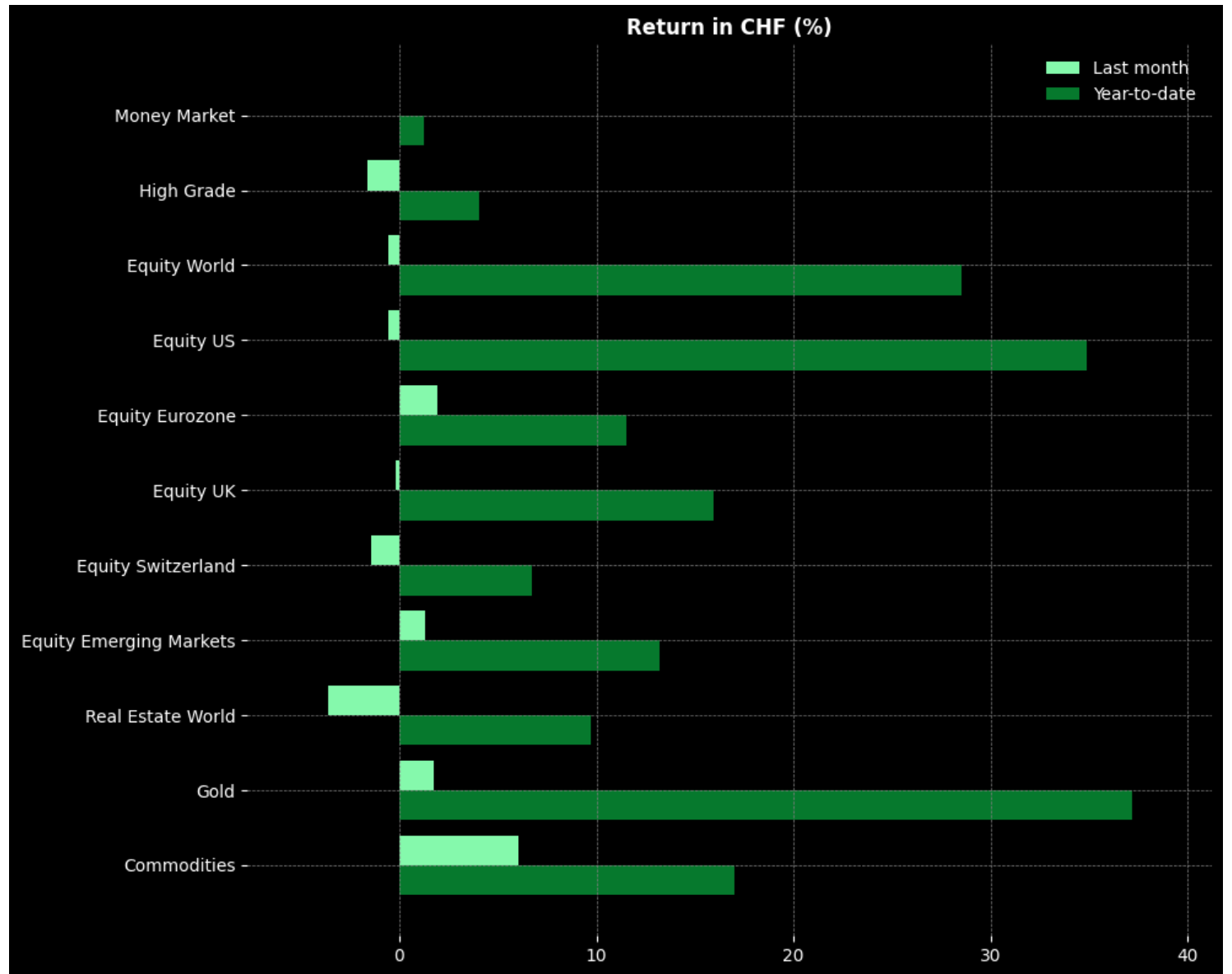


2024 Asset Class Performance: The Year in Review

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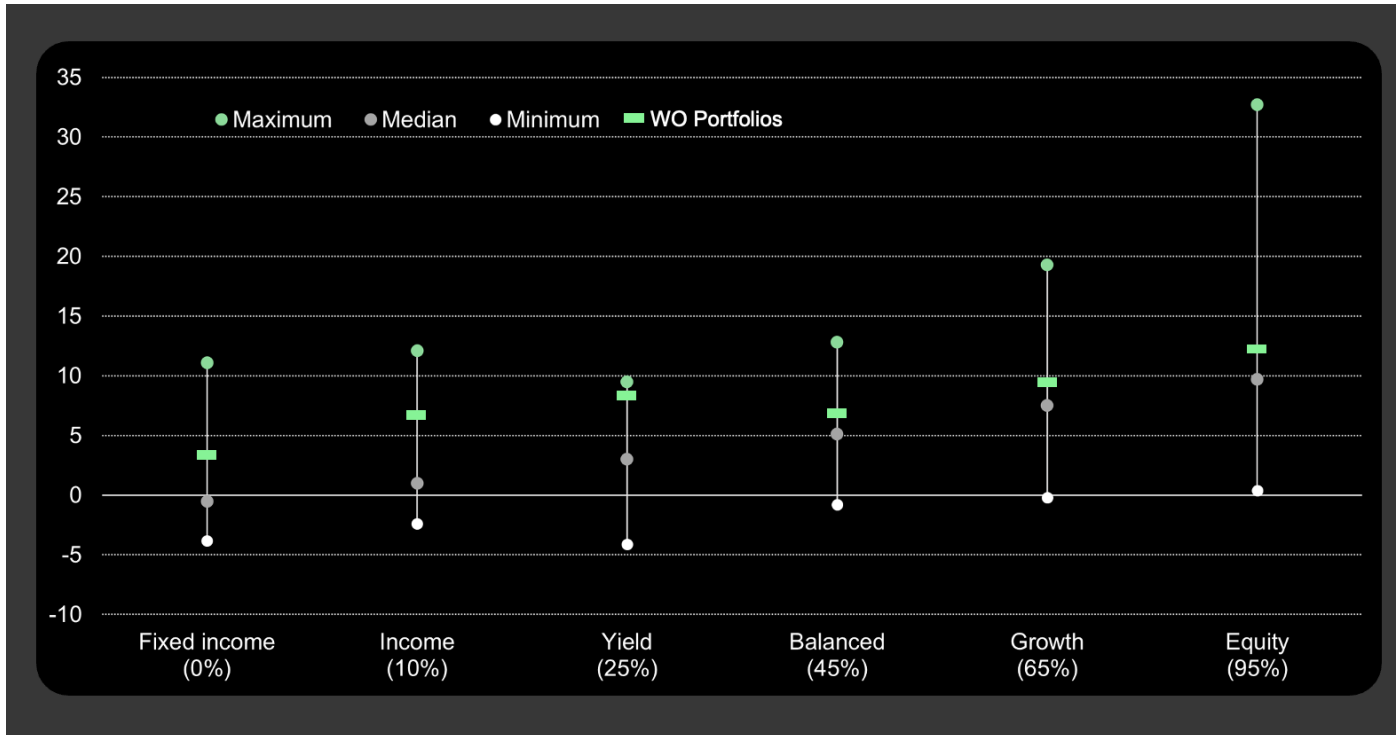


Asset Class Performances 2024



Source: ZWEI Wealth 2024

Take Aways: Client Observations (2024)



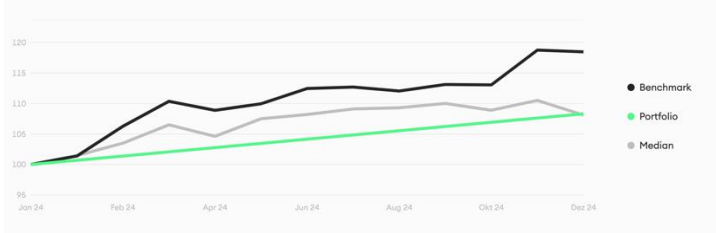
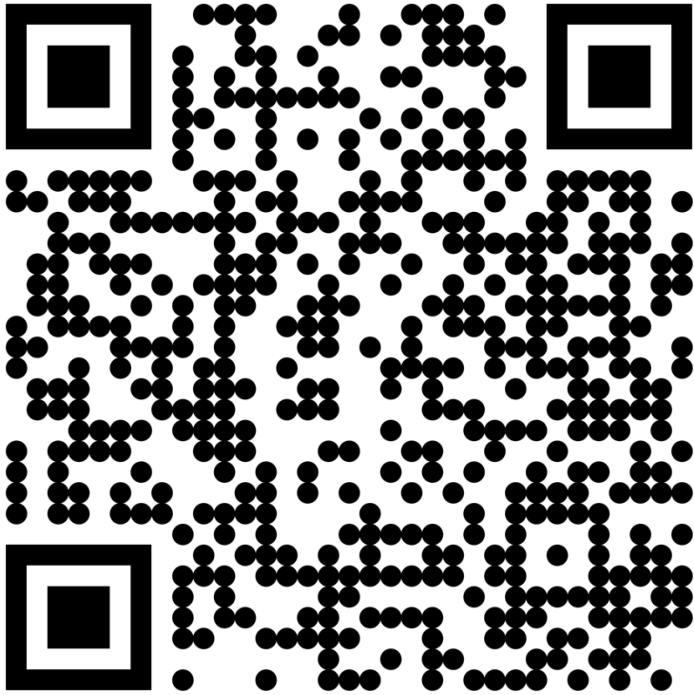
- Median returns positive
- Largest dispersion since measurement
- Difficult year for „Stock Picker“
- „Growth“ beats „Value“ and „Quality“
- Balanced Portfolios still sought after

Comparison Asset Allocation 2024

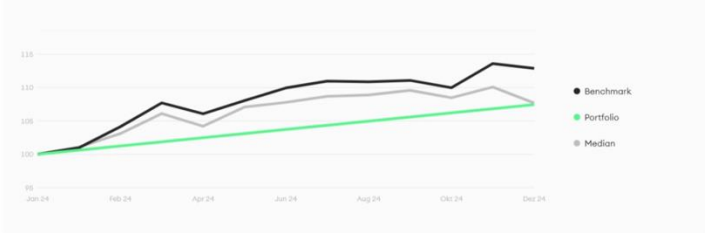
Asset Class	Market Observation*	ZWEI Wealth Platform	Trend (QoQ)
Cash	10%	7.7%	-
Bonds	19%	28.2%	-
Equities	28%	42.5%	+
Alternatives	42%	21.5%	0
t/o Real Estate	10%	10.2%	0
t/o Private Equity	22%	2.1%	0

*Source: UBS Global Family Office Report 2024©

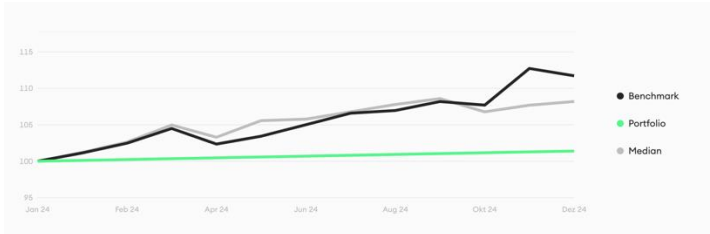
How did you do?



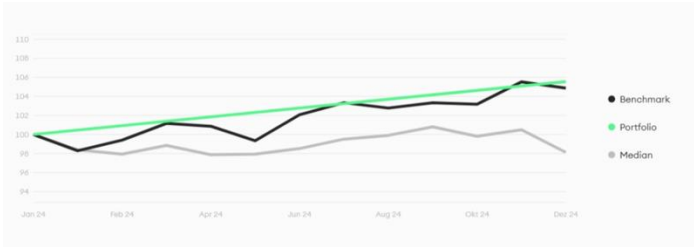
— Equity (CHF)



— Growth (CHF)



— Growth (EUR)



— Bonds (CHF)

Get in touch



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