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Kehrli & Zehnder Global Wealth Management AG in Zurich enters strategic partnership with Pfäffikon-based Santro Invest AG

Kehrli & Zehnder Global Wealth Management AG, a reputable wealth advisory firm that specializes in advising private clients and families, and Santro Invest AG, an asset management firm with a focus on institutional clients, have entered into a strategic partnership.

Kehrli & Zehnder was established in 2003 and provides independent wealth management and multi-family office services. The firm's headquarters are in Zurich, with representative offices in Lugano and Hong Kong.

Kehrli & Zehnder's investment philosophy is based on selecting the best in class in every asset category. Given that only about one third of active asset managers outperform the market, only those with a distinctive approach deliver above-benchmark returns. The firm therefore focuses on evaluating and selecting unique fund managers in the respective markets. Each year, over 200 managers from all over the world visit Kehrli & Zehnder's offices in Zurich. In addition, the partners conduct about 100 onsite manager meetings in New York, London and Hong Kong on an annual basis.

Santro Invest, founded in 2008, is an independent asset management firm that is supervised by the Swiss Financial Market Supervisory Authority (FINMA) and specialises in investment mandates, funds and financial analyses. Mandates include advising small and medium-sized Swiss pension funds on all matters relating to asset management.

Santro Invest adopts an active and risk-oriented investment approach with a focus on single stock investments. One of its key areas of expertise is Swiss equities. The firm's experience in this area and the network it has built are reflected in its "Swiss Opportunity Fund", an actively managed equities fund under Swiss law with investments predominantly in Swiss small- and midcap stocks.

This strategic partnership pools a myriad of knowledge and expertise in global asset management, macro-analysis, manager selection and single stock portfolio management, particularly in Swiss equities. The combined knowledge will be used to the benefit of private and institutional clients globally.

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