

# R & A Investment Research

# Outsourcing of research and asset management services

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**Outsourcing of selected research and asset management functions** (we do not «sell» investment research or products, but are considered by our clients equivalent to an in-house team).

For best client use: **Private label Research.**

**Professional asset managers use R & A research and asset management services for the following reasons**

- Professional quality research and asset management services.
- Investment strategy (lack of/support of in-house chief economist or chief strategist).
- Stock selection.
- Model portfolios.
- Cost.

# R & A Group: Your research outsourcing-partner

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<p><b>Comprehensive global macro analysis and strategy.</b></p>	<p><b>Comprehensive:</b> Economy, financial markets, asset allocation.  <b>Global:</b> Developed and the ever more important developing countries.  <b>Time horizon:</b> short-, medium-, long-term.  <b>Special topics and themes.</b>  <b>Fundamental</b> (transparent, comprehensible) and <b>disciplined</b> (quantitative models and filter).  Bottom-up know-how feeds into the asset allocation process.</p>
<p><b>Company analysis and model portfolios.</b></p>	<p><b>R &amp; A Quality-Select:</b> Systematic, successful stock-selection approach.  <b>Model portfolios</b> (equities, other asset classes).  Top-down know-how may feed into the stock selection process.</p>
<p><b>Modular building blocks.</b></p>	<p><b>Various modules available:</b> Strategy, portfolios, company reports, languages. Tailored to meet client needs.  Languages: German, English (selected products in French and Italian).</p>
<p><b>Target audience internal and external users.</b></p>	<p><b>Internal users:</b> Investment committees, portfolio management, client advisors.  <b>External users:</b> Clients (presentation material, brochure, company reports).</p>

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## Module 1

**Global economy, financial markets, investment strategy & asset allocation.**

Global economy and world financial markets:

- Quarterly trends and forecasts (ca. 60-100 PowerPoint slides).
- Conclusions for the investment strategy.
- Monthly updates (25-35 slides).

Quarterly presentation (at client premises).

Optional: Asset allocation grids (core/satellite).

Optional: Printed brochure.

## Module 2

**Stock selection & model portfolios.**

R & A Quality Select approach: Fundamental outlook, financial ratios (R& A Financial Conditions Index), valuation (proprietary earnings and cash flow model).

Recommended lists equities.

Model portfolios (equities, other asset classes).

Company reports for recommended stocks (private label, 1 page).

**Private label research** (languages English, German; selected products in French and Italian).

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R & A Group is an independent investment research and asset management company. R & A Group has a comprehensive investment research offering with a focus on investment strategies and global stock selection.

Founded in 2001, R A & Group is a joint stock company domiciled in Zurich and a member of the leading independent asset manager organization VSV (Swiss Association of Asset Managers).

***Investment-  
Research at Work™***

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Data sources in charts or tables that are not specifically mentioned are either companies or index provider.

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