

R & A Investment Research

Outsourcing of research and asset management services

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

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

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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).

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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