

## The IST services platform – customized solutions for pension funds

For some years now, IST has been focusing its strategic attention on providing tailor-made investment solutions for Swiss pension funds. It is thus sustainably positioning itself as a full-service provider in this area. To this end, it makes available to pension funds in Switzerland the successful and proven structure of IST with its cost-effective service platform.

### Pension funds pool their interests

To cover their investment needs, especially in niche segments, pension funds can join forces for the launch of new investment groups („club deals“).

In this way, they have the opportunity to jointly define the investment policy and guidelines of a corresponding product and to actively co-determine the selection of the responsible portfolio manager. Swiss pension funds of all sizes benefit from the pooling of pension assets.

In addition to exploiting economies of scale, the pension funds involved can benefit from the joint implementation of new, sometimes alternative, investment ideas and the exchange of information and know-how.

### Benefit from IST’s wealth of experience in manager selection

For the selection of the portfolio manager, the long-standing and broadly supported manager selection process of IST is applied.

In addition to a detailed analysis of the market and specialized providers, this also includes ongoing monitoring of the assigned portfolio manager and his performance.

In case of non-achievement of set investment targets, the management mandate is re-tendered and the responsible manager is replaced in a cost-saving manner and with the involvement of existing investors.

### Cost-effective, innovative solutions

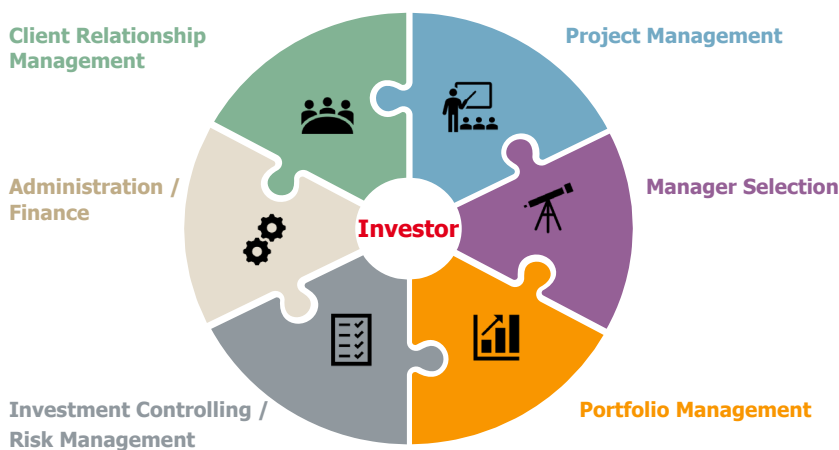
A unique selling point is the complete independence of the non-profit oriented IST. Together with Swiss pension funds, it pursues the same interests for the benefit of the insured: the best investment solution at the best possible conditions.

### Wide range of benefits for pension funds

The launch of tailor-made investment groups offers numerous advantages, whether for single investors or for pension funds pooling their common interests („club deals“):

- Utilization of IST’s many years of experience in project management and its large network of legal and tax experts.
- Investors’ right to have a say
- Independence in the choice of managers
- Cost-effective, pension fund-specific solutions to cover the benefit promises made to their members
- Outsourcing of risk management, reporting and administration to IST
- No custody fees for holding investment group claims with IST.

### Range of services - covering investor needs





# IST services platform

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