



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**.

- 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 net-work 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

As a non-profit organization, IST passes on the cost benefits achieved to its investors on the basis of the pooled volumes. A common thread running through our best-in-class approach is the inclusion of sustainability criteria - from manager selection to the exercise of voting rights.

BEST-IN-CLASS APPROACH TO MANAGER SELECTION

In managing individual investment groups, we rely on **external portfolio management expertise** and select the most suitable specialized asset manager after detailed analysis. We guarantee **complete independence and transparency for the selection process**.

The structured approach is supported by our independent research with the involvement of external information systems (Morningstar, Style Research, etc.).



We attach the greatest importance to the following factors:

- Selection of renowned asset managers with an excellent track record,
- Attractive conditions,
- Stable team of experienced investment specialists as well as a robust and proven investment process.

INVESTMENT CONTROLLING & RISK MANAGEMENT

Investment controlling ensures **efficient and objective** monitoring of the external asset managers, which guarantees the achievement of the defined investment objectives while complying with the risk specifications. Investment controlling and risk management are applied at different levels. The various steps are performed by a well diversified task-force of different specialists:

- **Internal risk control:** Involvement of the portfolio managers, the product teams of IST (traditional and alternative investments, real estate) and the Administration & Finance department
- **External control bodies:** These include the responsible committees of the Board of Trustees, IST-independent advisors, the custodian and the auditor.

Internal and external risk controls are part of our service package.



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