



GUIDING PRINCIPLES OF IST

Our vision

We are the preferred partner for first-class, innovative and customized investment solutions.

Our mission

Through first-class, innovative and customized investment solutions we help to provide a sustainable long-term basis for occupational pensions.

Our values

Independence

We are dedicated exclusively to serving our customers.

Expertise

We use our expertise to offer first-class investment solutions.

Commitment

We are prepared to go the extra mile for our customers, partners and employees and provide them with the greatest possible support.

Integrity

Integrity is part of everything we do.

STRATEGY 2024 / 2026

As an independent, specialized foundation dedicated exclusively to its investors, IST provides reasonably priced first-class investment products as well as customized professional solutions. IST's relationship with its investors is founded on mutual trust. Strong corporate governance and a powerful state-of-the-art risk management system form the basis for responsible, efficient and transparent business practices.

Mindful of its investors' interests, IST strives to achieve organic high-quality growth by capitalizing on its solid, independent market position, its modern cost-effective infrastructure as well as its extensive network of pension schemes and financial service providers.

IST pursues this growth objective largely by:

- systematically expanding its market position in the large pension scheme segment by setting up active satellites offering attractive conditions
- using the IST Foundations as a service platform for client-specific solutions and club deals, in particular in the real estate, infrastructure and related sectors
- consolidating and enlarging its broadly based Swiss-wide market position in the small and medium-sized pension schemes segment
- offering a comprehensive, economically priced best-in-class product range to implement core/satellite strategies
- integrating sustainability (ESG) criteria in its investment activities proactively and in a forward-looking, market-oriented way
- intensification of communication and marketing efforts and of other services (including product research).

CORPORATE GOVERNANCE





IST Investmentstiftung

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