

Proactive step for future regulation: FINMA supervision



As a financial intermediary and asset manager with locations in Zurich and Dietikon, Portas Capital AG became directly subordinate to FINMA as of 1 May (directly subordinate financial intermediary pursuant to the Swiss Money Laundering Act (GwG), DUFI). Our business model, past activity and future strategy was subject to an in-depth governmental audit.

We also meet the professional ethics for asset managers and are active members of the Association of Swiss Asset Managers (VSV). This proactive and voluntary step is not only a seal of approval for our clients but also a prerequisite for expansion in Europe. Further locations in our target markets will be announced in the near future.

Profile

As an owner-operated asset manager with a multi-family office approach, our core business is independent asset management and investment consultation for discerning clients. We have been successfully providing our clients with valuable private and institutional asset management for the last 7 years. We handle instructions for complete special fund solutions and family office services with the utmost care and competency.

As a regulated asset manager Portas Capital AG belongs to an exclusive network of bank-independent asset managers in Switzerland. Thus we aren't subject to misconceived incentives, incomprehensible management decisions or sales targets.

Team and investment philosophy

The partners at Portas Capital AG pooled their collective experience as management personnel in private banking at renowned addresses such as Bank Julius Bär, Bank Vontobel, Bank Safra Sarasin, Deutsche Bank, UBS, Crédit Suisse and Lombard Odier. For many years our numerous consultants have been published in respected journals and are sought-after experts in the media. As a company, we feel bound by the tradition of the (formerly) owner-operated private banks. In the family office, we specialise in a multi-manager strategy and evaluate the results of all providers in a neutral and detailed manner. Our multi-manager strategy is based on our own fund research, our in-house database and professional portfolio structuring and simulations. The individual goals and priorities of our clients are always at the heart of our investment strategies. Our clients enjoy the advantages of an efficient and secure safe deposit with a pure depository bank, a fair fixed fee (without hidden costs), as well as skilled, active and independent consultation and/or asset management with a gratifying performance record.