



## **HIGHLIGHTS**

Discover CA Indosuez (Switzerland) SA

*Architects of Wealth*

# THE INDOSUEZ WEALTH MANAGEMENT GROUP

For 145 years we have advised entrepreneurs and families all over the world, supporting them with expert financial advice and exceptional personal service. Our 3,060 staff members take a comprehensive view to work alongside our clients to help them build, manage, protect, and pass on their wealth. As “Architects of Wealth” we offer state-of-the-art advice and unsurpassed service to define efficient wealth structures and best-in-class investment solutions. With more than EUR 128 billion in assets under management (at 31 December 2020), Indosuez Wealth Management group is one of the world’s leaders in Wealth Management.

## OUR COVERAGE IN 13 AREAS AROUND THE WORLD



### EUROPE

Belgium  
Spain  
France  
Italy  
Luxembourg  
Monaco  
Switzerland

### MIDDLE EAST

United Arab Emirates

### ASIA-PACIFIC

Hong Kong SAR  
New Caledonia  
Singapore

### AMERICAS

Brazil  
Miami  
Uruguay

### ASSETS UNDER MANAGEMENT

AT 31.12.2020

EUR

**128** bn **3,060**

employees with multiple areas of expertise

## AWARDS

The Indosuez Wealth Management group is regularly recognised by Wealth Management professionals around the world. These accolades attest to the relevance of the Indosuez strategy and underline the quality of our experts. The awards acknowledge our developments in responsible finance and social responsibility. Indosuez’s commitments are now embodied in an innovative offer deployed across all asset classes in perfect alignment with the business lines of the Crédit Agricole group and with the mission to serve clients. Finally, the group is frequently lauded for its innovation initiatives and its efforts to promote diversity and gender equality.



# THE CRÉDIT AGRICOLE GROUP

## CRÉDIT AGRICOLE GROUP

Published net income,  
Group share EUR

**4.7**

bn

Shareholders' equity,  
Group share EUR

**119.6**

bn

Fully loaded CET1 solvency ratio

**17.2%**

## CRÉDIT AGRICOLE S.A.

Published net income,  
Group share EUR

**2.7**

bn

Shareholders' equity,  
Group share EUR

**65.2**

bn

Fully loaded CET1 solvency ratio

**13.1%**

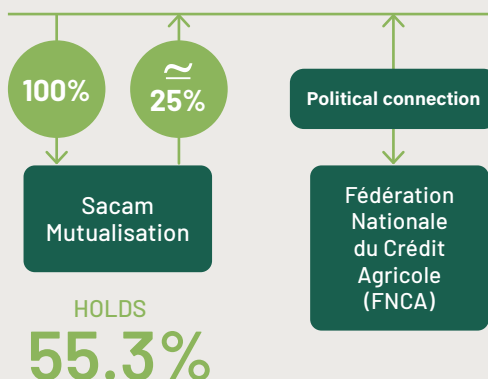
## REGIONAL BANKS

**10.9 m**  
COOPERATIVE MEMBERS  
hold shares in

**2,410**  
LOCAL BANKS

**39**  
REGIONAL BANKS

own a majority stake in the capital  
of Crédit Agricole S.A.  
through the SAS Rue La Boétie<sup>(1)</sup>



**10<sup>th</sup>**  
largest bank  
in the world

By balance sheet  
Source: The Banker,  
July 2020



**No. 1**  
European asset  
manager

Source: IPE  
"Top 500 Asset Managers"  
published in June 2020  
on the basis of assets  
under management  
at 31.12.2019



**No. 1**  
financer of  
the French  
economy

Internal source:  
Economic research  
department



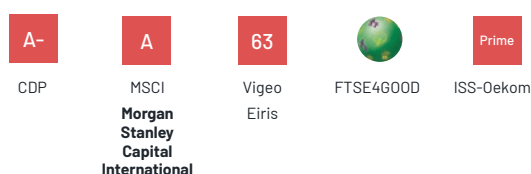
**No. 1**  
Insurer  
in France

Source:  
Argus de l'Assurance,  
December 2020,  
ranking based on  
2019 turnover

## FINANCIAL RATINGS AT 01.03.2021



## NON-FINANCIAL RATINGS AT 01.03.2021



(1) La Caisse Régionale de la Corse, which is 99.9% owned by Crédit Agricole S.A., is a shareholder in Sacam Mutualisation.

# SOLUTIONS TAILORED TO EACH CLIENT'S NEEDS

Indosuez Wealth Management proposes **three distinct approaches** that open the door to a vast range of management and advisory opportunities, with a dedicated pricing structure.

## → DISCOVER

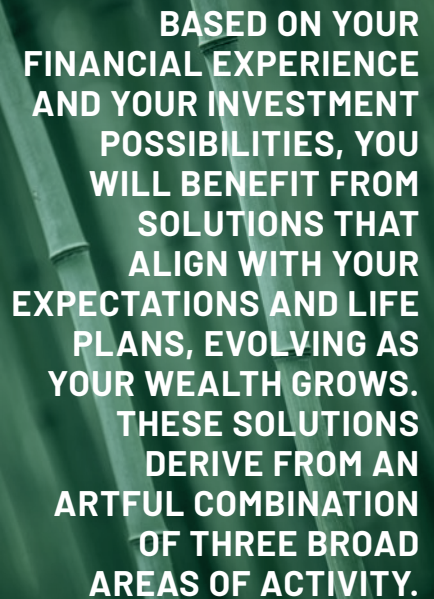
A first step in personalised wealth management as part of an investment advisory relationship based on a clearly defined selection of products or a discretionary management mandate.

## → EXPLORE

A targeted investment advisory service or a discretionary diversified management mandate adjusted to your profile and personal circumstances.

## → DESIGN

A proactive investment advisory service or personalised wealth management.  
A Design Unlimited solution gives you access to even more personalised services.



**BASED ON YOUR FINANCIAL EXPERIENCE AND YOUR INVESTMENT POSSIBILITIES, YOU WILL BENEFIT FROM SOLUTIONS THAT ALIGN WITH YOUR EXPECTATIONS AND LIFE PLANS, EVOLVING AS YOUR WEALTH GROWS. THESE SOLUTIONS DERIVE FROM AN ARTFUL COMBINATION OF THREE BROAD AREAS OF ACTIVITY.**

## STRUCTURING WEALTH

Organising your assets is essential if you hope to develop a suitable investment strategy. Our legal and tax experts, corporate finance professionals, finance structuring and philanthropy specialists will assist you in analysing and structuring your professional and personal assets to bring you closer to your goals.

Assistance with wealth and estate planning.

Analysis of the impact of your business plans on your personal wealth.

Support in carrying out your strategic equity transactions.

Mobilisation of the sector-specific expertise and capacity for action of the Crédit Agricole group (or its external partners).

Financing solutions combined with financial, real estate and movable asset investment plans, cash requirements, etc.

Help in bringing your philanthropic vision to life.

## INVESTING WEALTH

Whatever the management and investment universe you choose, Indosuez Wealth Management has developed a range of exemplary services to meet your needs and achieve your goals. These services are offered in two formats:

### • Discretionary management:

Count on our teams to generate value by actively managing your assets.

### • Investment advice:

You carry out transactions directly on the markets while receiving proactive, personalised advice.

Our investment offerings include sustainable and responsible investment criteria.

### TRADITIONAL ASSET CLASSES:

- Shares, bonds, money market.
- Investment funds.

### LIFE INSURANCE

### DIVERSIFICATION SOLUTIONS:

- Currency and precious metals.
- Structured products.
- Hedging and leverage solutions.
- Private equity.
- Real estate.

### RESPONSIBLE AND IMPACT INVESTMENTS:

- Responsible solutions (investment funds, structured products, etc.).
- Thematic management.



CA Indosuez (Switzerland) SA ranks among the top five foreign banks in Switzerland, with a presence in the country dating back over 145 years.

We operate our businesses in Switzerland through four locations, in Geneva, Lausanne, Lugano and Zurich, and worldwide through a network of dedicated Wealth Management offices, chiefly in Asia and the Middle East, with additional representation in Uruguay and Brazil.

## AT YOUR SIDE FOR 145 YEARS

KEY FIGURES AT 31.12.2020

Balance sheet total CHF

**16**  
bn

Assets under management CHF

**39.3**  
bn

Tier 1 capital ratio

**17.6%**

Our philosophy is founded on transparency, independent wealth management advice and a carefully selected range of investment products intended to sustain your assets.

CA Indosuez (Switzerland) SA operates in two main business areas:

- Wealth Management.
- Transactional Commodity Finance, and Commercial Banking.

These activities are supplemented by a coverage function for large corporations and financial institutions. This broad range of expertise allows CA Indosuez (Switzerland) SA to serve a diversified client base comprising individuals, institutions and businesses.

### BANKING AND BEYOND

To allow you to focus on what matters most, Indosuez Wealth Management has supplemented its management, structuring, financing, and investment services with a whole series of solutions designed to help you with the day-to-day management of your business with the commitment to offer you exemplary service, and beyond.

- Daily banking services.
- Direct access to our trading floor.
- Preferential access to the expertise of the Crédit Agricole Group and to the Villages within the CA network.
- CSR commitments.
- Innovation (start-up support, Innovation Lab).
- Access to exclusive local and international events.
- Specialised publications and trainings.





**THE INDOSUEZ FOUNDATION  
 IN SWITZERLAND HAS A  
 TWO-FOLD MISSION:**

- INTERNATIONALLY, TO SUPPORT LOCAL COMMUNITIES THROUGH ENVIRONMENTAL PROJECTS THAT IMPROVE SOCIAL AND ECONOMIC CIRCUMSTANCES; AND**
- LOCALLY, TO EMPOWER ITS EMPLOYEES TO ENGAGE IN SOLIDARITY ACTIONS THROUGH CITIZEN DAYS, WHEN THE BANK GIVES THEM A WORK DAY TO SPEND VOLUNTEERING.**



Support local communities with international environmental projects

**PROJECT SUPPORT**



Volunteering programme aimed at social and environmental causes

**EMPLOYEE VOLUNTEERING**

**2012**

**22**

**12**

Year in which the Indosuez Foundation in Switzerland was founded

projects funded since 2012

countries in which the Foundation has contributed



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Document finalised: April 2021.