

# Introducing Origins Capital

Business, Services and Expertise Tailored to the Institutional Market

May, 2023

[www.originscapital.ch/](http://www.originscapital.ch/)

# About Origins Capital

Origins Capital Ltd. was founded in 2015 as a family investment holding incorporated in Switzerland. In 2021 the company expanded its scope becoming an advisory, consulting and proprietary investment company.

Building on the experience gained by working with leading financial institutions, Origins Capital offers tailored services to a variety of institutional clients, such as Insurance Companies, Pension Funds and Family Offices.

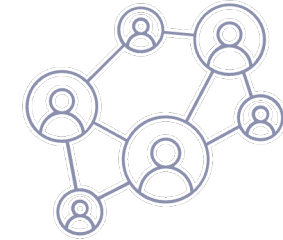
2015

- Established as a holding company



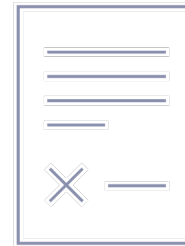
2022

- Advisory services' breadth develops
- Origins-Connect agreement signed



2021

- Business' scope enhancement
- Website Launched
- Operations start in advisory services



2023

- More Origins-Connect agreements signed
- Research capabilities expanded

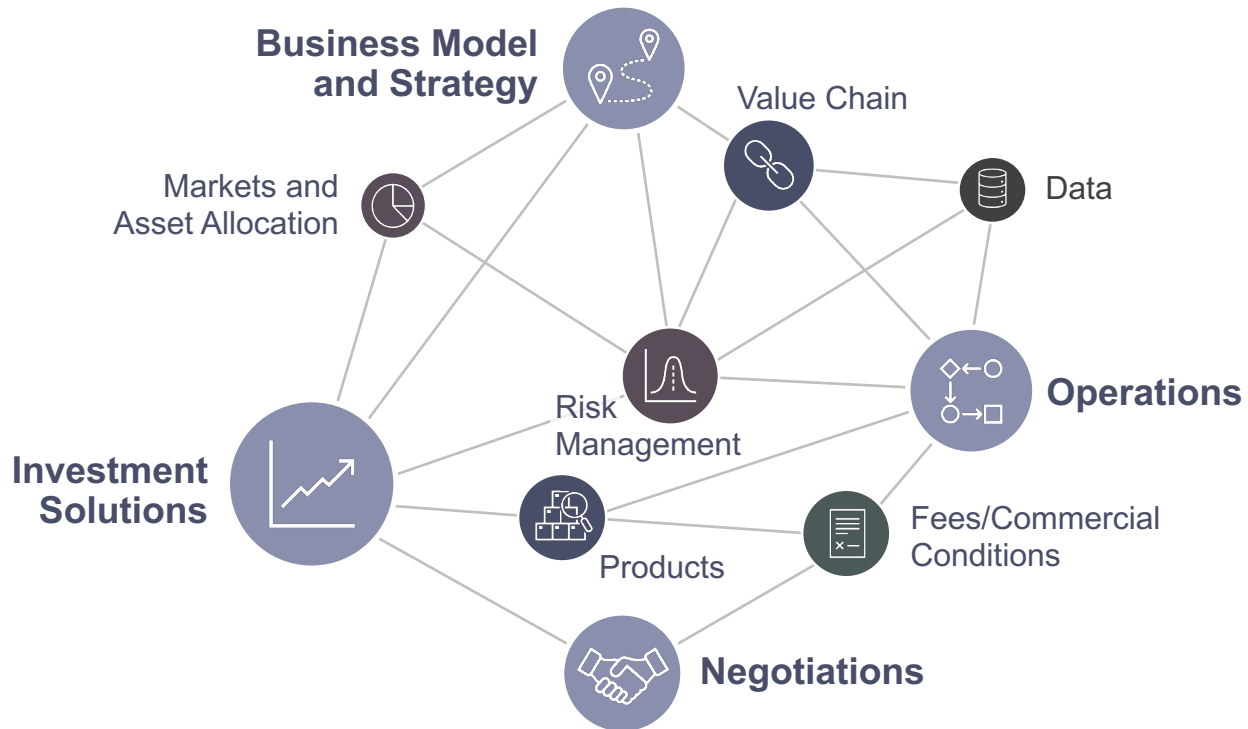
# Services Tailored to Institutional and Qualified Investors

- Origins Capital's business is expanding in 2023
- Consulting and advisory services' **capabilities have been enhanced through partnerships and sourcing** with a lead global research and services provider
- Origins-Connect is growing, reaching more institutional investors and investment solutions' providers alike



# Advisory and Consulting – Connecting the Dots

## Consulting and Advisory Holistic Support




Origins Capital is the perfect sparring partner to engage with, we can:

- **Design your asset management value proposition and value chain**
- **Nourish your functional leadership with constructive challenges and coaching**
- **Support your business development holistically acting as connector and integrator among teams and processes**
- **Bringing in best-in-class investment process practices, including policies and guidelines definition**
- **Select data and service providers to best fit your front-to-back process**
- **Negotiate in your behalf competitive commercial terms and conditions with**
  - **Asset Managers**
  - **Data and IT Providers**
- **Act as an outsourced Chief Investment Officer/CIO Office**

# From Strategy Definition to Process Implementation

## Consulting and Advisory Strategy & Investments




 **Business Model & Strategy** Strategic Planning and Transformation  
Talent acquisition

 **Investment Solutions** Investment Process - ALM\* - Total Return  
Financial markets research - Thematic research - ESG and Sustainability  
Markets and investment strategy, Asset Allocation and Portfolio Construction  
Product Development (UCITS, mandates)  
Cross-Asset Class valuations and relative value - Risk Management  
Portfolio manager selection and due diligence - liquid and alternative asset classes  
Outsourced CIO Office

## Consulting and Advisory Operations



 **Operations** Investment process, policies and procedures  
Portfolio investment guidelines  
Investment Management and Service Level Agreements  
Front Office, Risk Management and Reporting platforms - Selection Process and Business requirements integration  
Financial/Market/ESG Data Acquisition – Vendors Selection Process

# Effective Negotiations for Sustainable Solutions

## Consulting and Advisory Negotiations



### Negotiations

Portfolio Managers - Fees definition and Negotiation

Front Office and Risk Management systems - Contractual-commercial negotiation

Financial/Market/ESG data and services acquisition - Contractual-commercial negotiation

Index/Benchmark providers – Contracts and fees negotiation

Consulting and Advisory expertise and Experience:

- **Built on decades of direct investment and asset allocation responsibilities of large proprietary and third-party asset portfolios**
- **Supported by the large network built with asset managers, financial service providers and investors**
- **Reflected in the trust given by a major financial institution for an advisory mandate supporting asset management functional and investment process transformation**
- **Confirmed by successfully delivering in consulting projects involving major data and system providers (market indices, ESG data, front office platform)**

# Connecting Investors with Providers, Strategize and Counsel

## Origins Connect



Investor-to-solution provider - Ad-hoc search and connection - portfolio management - private equity investments, structured investment products and solutions, financial services (including administration and operations)



Introducer of best-in-class global asset management institutions, niche investment managers and financial service providers



Experts and investors networking - know-how driven



Roundtables and focused events on key investment themes - long-term secular trends, mid- and short-term market opportunities and challenges

## Board Directorship and Committee External Membership



**Board Mandates - independent, non-executive**

Asset Management  
Insurance  
Pension Funds  
Foundations  
Family Offices



**Investment Committees external membership**

Asset Management  
Insurance  
Pension Funds  
Foundations  
Family Offices



**Investment Organizations membership and non-financial, non-profit entities**

Foundations  
Business Associations

# Origins Capital – Your Trusted Partner

Deep expertise and hands-on experience – Flexible fee solutions to fit client’s objectives



**Pierangelo Franzoni**

Managing Director and CIO

## Experience and Know-how

- 25+ years experience in third-party investments and proprietary insurance asset management across global liquid and alternative asset classes
- Strong track record in Risk Management, Portfolio Management, Investment Strategy and Asset Allocation functions
- Direct oversight and P/L responsibilities on both small and large multi-billion global investment portfolios
- Strong relationships and extensive connections within the financial industry, including global lead asset managers and institutional investors
- Business and commercial negotiations: investment fees, data platforms and services negotiation for clients – proven track record

## Highlights:

- **Breadth of direct experience: from local small/medium organizations to large global institutions**
- **Entrepreneur and investor – Hands-on approach**
- **Extensive global professional network**
- **Competencies matured in expert, executive, and consulting roles: investment, asset allocation, market strategy, operations**
- **C-suite memberships (executive and investment committees – CIO) and Board directorships**
- **Experience in multi-cultural and diverse environments – Teams builder and mentor**
- **Flexible fee structures and solutions: time/effort based, goal achievement based or all-in-fees, designed to best fit clients’ needs and objectives**



# Thank You

For more information please contact: [info@originscapital.ch](mailto:info@originscapital.ch)  
or find us online [www.originscapital.ch](http://www.originscapital.ch)