

«It is now that the really crucial decisions are being taken.»

In an age in which jobs are above all being cut, some operators are bucking the trend and expanding. For example the Zurich-based asset management company Helvetic Trust, which is celebrating its 10th anniversary today.



Within the Swiss financial sector, the 49 year-old **Kaspar Grob** (photo above) is a recognised authority. Even if he is not constantly in the headlines. He pursues his objectives tenaciously, and with palpable success.

When Zurich-born Grob struck out on his own in September 2001 to found Helvetic Trust, which specialises in asset management, he could not have imagined where the journey would take him.

Focus on long-term trends

The early days were not auspicious, as Kaspar Grob admits in an interview with

finews.ch. After all, the internet bubble burst at the beginning of the 21st century. However, implementation of his trend allocation concept soon enabled him to establish his reputation. This investment strategy uses a complex process to identify long-term trends, and realises a corresponding distribution and weighting of the invested money.

Own money always also invested

Not without pride, Kaspar Grob points out that since the launch in 2001 this strategy has outperformed the MSCI World Index every year, without exception. Early identification of trends was also the unique selling proposition (USP), i.e. the decisive characteristic used to distinguish Helvetic Trust from the competition and to raise its market profile, as Management Board member **Yvan Mauron** (photo below) explains.



In other words: the company managed from an early date to anticipate some of the biggest movements in the financial world. "Because we have also always

invested our own money in our investment ideas, we have consistently enjoyed a high degree of credibility vis-à-vis our clients", stresses Renzo A. Berger, Senior Partner and member of the Board of Directors.

Berne, Lausanne, London

For example, Helvetic Trust entered emerging markets back in 2004, and from 2006 onwards built up substantial gold positions at a time when an ounce of the precious metal was priced at USD 500 (today: USD 1,700). In 2008 the company reduced its bond ratio in favour of real estate, some of which has been brought together in Helvetic Trust Estates, and which today accounts for a portfolio worth CHF 150 million.

In the year 2008 Grob also began building up commodity and energy positions in the client portfolios.

Parallel to this development, the original one-man company expanded steadily: a first branch was opened in Berne in 2003. This was followed two years later by an office in Lausanne. A representative office was also established in the year 2008, which is to say in the midst of the financial crisis.

The business style nurtured by the company's management team clearly involves taking major and trailblazing decisions in difficult times, which enable the company to advance strongly. This remains the case to this day.

Expanded workforce

While other financial institutions are busy

trimming their personnel, Helvetic Trust recently appointed the Head of the Bernese office, Yvan Mauron, as a member of the Management Board. **Renzo A. Berger**, who previously held a senior position at Deutsche Bank (Switzerland), has been elected to the Board of Directors, as finews.ch reported. In addition, at the beginning of November **Samuel Baeriswyl** (photo below) joined Helvetic Trust as a Senior Partner.



At the same time, the business premises at the Zurich head office were expanded. Today the company has 16 partners and employs a total of 27 individuals.

Independent and owner-run

Ten years after its foundation, Helvetic Trust is a broadly-based group that focuses on the needs of high net-worth private individuals, including many entrepreneurs and managers, as well as – in the sense of a family office – wealthy families.

To this day, the company has remained financially independent and owner-run, as Grob is keen to point out. There are no

plans to change this situation. Professional passion and dedication is still very evident in Kaspar Grob. He himself says he has turned his hobby into his profession, which for his clientele is certainly the ideal precondition for a long-term relationship.

Strong foundations

In the present market environment Grob is steering clear of bank, utility and telecommunication stocks. He justifies this on the grounds that these are either poorly capitalised, offer weak growth or are insufficiently profitable.

In contrast to other financial institutions, which currently appear unsettled and lacking in direction, Helvetic Trust remains strategically well-positioned. With its precious metal, commodity and real estate holdings, the company has a strong basis with which successfully to navigate today's difficult times.

Ready for the rebound

At the same time, thanks to its trend allocation system, the company is well-prepared to benefit from any recovery in the market. "We are excellently positioned when it comes to the rebound," assures Grob.

"It is particularly during such market phases that we are able to generate significant outperformance, thanks to our investment processes," says the company founder. Helvetic Trust's consistent and successful performance over the past ten years gives this statement added weight.

Helvetic Trust AG was founded by Kaspar Grob in Zurich in the year 2001, and is currently wholly-owned by its 16 active partners. In addition to the head office in Zurich, the company also has branches in Berne and Lausanne as well as an office in London.