Historical Asset Management Business



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Historical Asset Management Business

Exceptional opportunity to acquire a well-established Historical Asset Management Business regulated under the Cyprus Securities and Exchange Commission (CySEC).

Key Highlights

Regulatory Compliance: As a CySEC-regulated entity, the business adheres to the highest standards of compliance and governance, ensuring investor confidence and operational integrity.

Robust AUM: With €450 million in AUM, the business has demonstrated its capability to attract and manage substantial client assets, providing a stable foundation for ongoing growth and profitability.

Strong Revenue Stream: The business generates approx €1.5/1.75 million in annual revenue, showcasing its effectiveness in asset management and client retention, alongside a diverse portfolio of investment strategies that cater to various investor needs.

Market Position: Established in the competitive landscape of asset management, the firm holds a significant market position, benefiting from a loyal client base and strong relationships with institutional and retail investors.

Growth Potential: With the asset management industry continuously evolving, there are numerous opportunities for expansion, including the introduction of new investment products, targeting additional market segments, and leveraging technological advancements to enhance service delivery and client engagement.

This Historical Asset Management Business represents an ideal acquisition for investors or firms looking to enhance their portfolio within the asset management sector. With a proven track record, solid financials, and regulatory backing, this opportunity is poised for continued success and expansion in the dynamic investment landscape.

Keypoints

- Offering mainly / Advisory Service / Portfolio Management
- Approx. 400 Customers (Greek / Cypriots)
- Low Customers Concentration
- Cost Efficient Professional Team (300K-325K per Year)
- Swiss / Lux / UAE Custodian Banks
- Active Funds under Cyprus Law
- Banks (UBS Swiss, CBP Quilvest, Piraeus Bank, CIM Banque, Eurobank Hellas, Bank f Cyprus)
- Revenue Streams:
    - Management Fees
    - Retro
    - Performance Fees
    - Service fees
    - Investment Advisory Fees
    - Others

TARGET PRICE
EUR 9,750,000

GROSS REVENUE
EUR 2,600,000

EBITDA
EUR 1,100,000

BUSINESS TYPE
Asset Management

COUNTRY
Cyprus

BUSINESS ID
L#20250891

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