Swiss FINMA Regulated Asset Management Firm



PRINTED ON: *November 6, 2026, 12:27 AM (EST)* **PUBLISHED ON:** *April 13, 2025, 9:49 AM (EST)* **UPDATED ON:** *August 8, 2026, 4:31 AM (EST)*

MERGERSCORP

Swiss FINMA Regulated Asset Management Firm

The firm is a specialized financial services provider operating with the highest standards of regulatory compliance under Swiss law.

The entity holds the official **Asset Manager** license (Gestionnaire de fortune) granted by the **Swiss Financial Market Supervisory Authority (FINMA)**, pursuant to **Article 17 of the Financial Institutions Act (FinIA)**. This authorization subjects the firm to strict prudential supervision, ensuring it meets the rigorous organizational, financial, and conduct requirements mandated by the Swiss regulatory framework.

Scope of Services

The firm's mandate is the provision of tailored and sophisticated wealth management solutions to its client base.

- **Discretionary Mandates:** The firm offers comprehensive portfolio management where its seasoned experts assume responsibility for investment decisions within a pre-agreed strategy, aiming for optimal long-term growth and capital preservation.
- **Advisory Mandates:** For clients who prefer to maintain final decision-making authority, the firm provides personalized, timely investment advice and recommendations, ensuring the client is well-informed before execution.
- **Dynamic Mandates:** Specialization includes dynamic investment strategies that actively adjust asset allocations based on evolving market conditions, offering a pro-active and risk-managed approach to wealth growth.

Trading Expertise and Instruments

The firm facilitates execution across a broad spectrum of global financial instruments, ensuring comprehensive and responsive brokerage services for its clients:

- **Traditional Markets:** Execution of trades in global **Stocks/Equities, Futures,** and **Index**-linked products.
- **Advanced Instruments:** Expertise extends to trading **Contracts for Difference (CFDs)** and **Foreign Exchange (FX)**, enabling precise and efficient market positioning.
- **Digital Assets:** The firm is equipped to manage and execute trades in major **Cryptocurrencies**, integrating these new asset classes into traditional wealth management structures.

Key Metrics and Infrastructure

TARGET PRICE
CHF 7,250,000

GROSS REVENUE
CHF 2,750,000

EBITDA
CHF 1,250,000

BUSINESS TYPE
Asset Management

COUNTRY
Switzerland

BUSINESS ID
L#20250893

MERGERSCORP M&A INTERNATIONAL IS A GLOBAL BRAND OPERATED BY MERGERSUS INC.A US CORPORATION WITH REGISTERED OFFICE AT 40TH WALL STREET, SUITE #2725, NEW YORK, NEW YORK 10005, UNITED STATES OF AMERICA.

- **Custodian Banks:** Client assets are held exclusively with a select group of leading, FINMA-regulated Swiss institutions, including **Safra Sarasin, UBS, Lombard Odier,** and **Swissquote**. This segregation ensures maximum asset security and independence.

- **Assets Under Management (AUM):** The firm is entrusted with a robust portfolio totaling **CHF 70 Million**.

- **Client Focus:** The operational structure is designed to provide highly personalized service to a focused base of **50 to 100** private and institutional clients.

- **Geographic Focus:** The client relationships are primarily concentrated across **Western Europe**, where the firm serves as a trusted Swiss partner for sophisticated financial needs.

MERGERSCORP M&A INTERNATIONAL IS A GLOBAL BRAND OPERATED BY MERGERSUS INC.A US CORPORATION WITH REGISTERED OFFICE AT 40TH WALL STREET, SUITE #2725, NEW YORK, NEW YORK 10005, UNITED STATES OF AMERICA.

The information contained herein does not constitute an offer to sell or a solicitation of an offer or a recommendation to purchase securities under the securities laws of any jurisdiction, including the United States Securities Act of 1933, as amended, or any US state securities laws, or a solicitation to enter into any other transaction

The projected financial information contained in the Memorandum is based on judgmental estimates and assumptions made by the management of the target Company, about circumstances and events that have not yet taken place. Accordingly, there can be no assurance that the projected results will be attained. In particular, but without prejudice to the generality of the foregoing, no representation or warranty whatsoever is given in relation to the reasonableness or achievability of the projections contained in the Memorandum or in relation to the bases and assumptions underlying such projections and you must satisfy yourself in relation to the reasonableness, achievability and accuracy thereof.

By delivering this Memorandum, neither MergersUS Inc., nor its authorized agents are making any recommendations regarding the acquisition or strategies outlined herein. Interested parties shall exercise independent judgment in, and have sole responsibility for, determining whether an acquisition of the Company is suitable for them, and neither MergersUS Inc, nor its authorized agents have responsibility to, and will not, monitor the condition of interested parties to determine that an acquisition is or remains suitable for them. Among other things, suitability of an acquisition will depend upon an interested party's investment and business plans and financial situation.

This document is prepared for information purposes only. It is made available on the express understanding that it will be used for the sole purpose of assisting the recipients to decide whether they wish to proceed with a further investigation of the Proposed Transaction.

The recipients realize and agree that this document is not intended to form the basis of any investment decision or any other appraisal or decision regarding the Proposed Transaction, and does not constitute the basis for the contract which may be concluded in relation to the Proposed Transaction.

All information contained in this document may subsequently be updated and adjusted. MergersUS Inc. has not independently verified any of the information contained herein or on which this document is based. Neither the Company, nor its management or shareholders, nor MergersUS Inc. , nor any of their respective directors, partners, officers, employees or affiliates make any representation or warranty (express or implied) or accept or will accept any responsibility or liability regarding or in relation to the accuracy or completeness of the information contained in this document or any other written or oral information made available to any interested party or its advisers. Any liability in respect of any such information or any inaccuracy in or omission from the document is expressly disclaimed.

MERGERSCORP

© 2026 MergersCorp M&A International. All rights reserved.

© 2026 MergersCorp M&A International. MergersCorp™ M&A International is the collective brand name of independent affiliates of MergersCorp M&A International. For more details on the nature of our affiliation, please visit us on our website https://www.mergerscorp.com/disclaimer. MergersCorp M&A International is not a registered broker-dealer under the U.S. securities laws. MergersCorp M&A International does not offer or sell securities or provide investment advice or underwriting services. The articles or publications contained in this presentation are not intended to provide specific business or investment advice. The author or MergersCorp M&A International shall not be liable for any errors or omissions, or for any loss suffered by any person or organization acting or refraining from acting as a result of the content of this website. It is recommended that specific independent advice be sought before making any business or investment decision.

MERGERSCORP

WWW.MERGERSCORP.COM