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## Wall Street Italia

# Banor SIM is best asset manager in the “Portfolio Quality” category in the Istituto Tedesco Qualità e Finanza survey

BANOR SIM, which has taken part for the first time to the survey produced by the Istituto Tedesco Qualità e Finanza to select the best asset managers, won second place. Banor was selected from the 200 investment firms who were initially contacted for the evaluation and the nine firms who passed the strict quality tests. The analysis was conducted jointly by the Istituto Tedesco Qualità e Finanza and the Munich-based Institut für Vermögensaufbau (Institute for Asset Growth), both of which are independent of banking institutions. As we can read in the press release issued by Banor, a firm specialising in investment solutions for private and institutional investors, the analysis assessed participants by assigning them a score for three distinct spheres: Organisation and Transparency, Customer Focus and Portfolio Quality. Banor SIM was judged “best asset manager” in the last-named category, Portfolio Quality.

The assessment criteria include the company’s organisational structure and systems, which must be customer-oriented and of a high quality; proportionality between risk and returns in the proposed portfolio and its reaction to situations of stress; the suitability of the instruments proposed for the portfolio’s strategic objectives; the alignment of costs to those applied in the market; and transparency. The Istituto Tedesco Qualità e Finanza is a European leader in surveys and quality marks. Every year it analyses products and services in different economic sectors and listens to consumers’ opinions to provide them with an instrument to recognise which companies best meet their needs.

Massimiliano Cagliero, Chief Executive Officer at Banor SIM, does not hide his satisfaction at the result, or that of his team. “All of the team at Banor SIM is very pleased with this important recognition. It rewards the quality of our service and the great care we take in selecting the instruments and securities that we use to build clients’ portfolios. We are especially proud to be, in essence, the ‘Best Asset Manager’ if you take our independence into consideration”.

Since 2000, Banor SIM has offered its private and institutional clients investments that follow the **value investing** philosophy. They place great importance on environmental, social and governance (ESG) issues during the stock-picking process, using a proprietary evaluation model that starts from an analysis of companies’ sustainability ratings.