



### Eric Sturdza Asset Management SA

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**Teamgröße:** 22 Mitarbeitende ((gesamt))

### Ansprechpartner für das institutionelle Geschäft:

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### Unternehmensüberblick/Kurzbeschreibung:

Eric Sturdza Asset Management, which operates under the Eric Sturdza Investments brand, is a Swiss, active high conviction fund manager providing a global range of actively managed strategies to institutional and high net worth clients. Our UCITS strategies and tailored mandates are run by talented portfolio managers with global reach and extensive track records. ESAM is part of the Geneva-based Eric Sturdza Group SA, which incorporates a private bank, a family office and a wealth management company. ESAM is based in Geneva with partner offices in Guernsey and Luxembourg.

### Im deutschsprachigen Markt aktiv seit: 2012

#### Mitgliedschaften in Verbänden:

☐ BVI ☐ BAI ☐ EFAMA

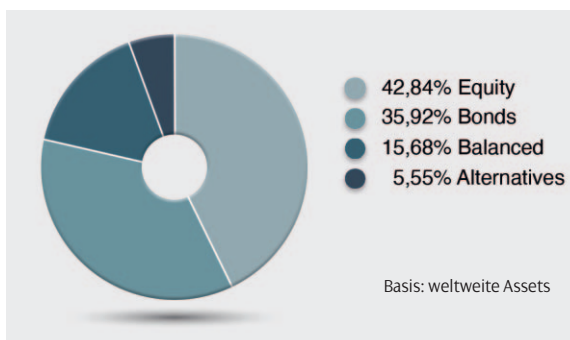
#### Assets under Management in Zahlen (in Mio. Euro):

**ca. 2.000** AuM weltweit  
(Daten zum 31. Januar 2025)

#### Angebotene Investmentvehikel:

- ☒ Spezialfonds/Segmentfonds
- ☒ Publikumsfonds (OGAW/UCITS)
- ☒ Strukturen/Zertifikate
- ☐ Closed-End-Funds
- ☒ Andere: Segregated Accounts

### Assets under Management nach Assetklassen (in %):



### Services:

- ☒ Advisory/Sub-Advisory
- ☒ Master-KVG/KVG
- ☐ Depotbank Operations
- ☒ Asset Allocation (SAA/TAA/GTAA)
- ☒ Research
- ☒ Overlay Management
- ☐ Liability Management
- ☐ Risk Management
- ☐ Andere

### Performancemessung/-verifizierung:

- ☒ Intern ☐ Extern

Remark: Valuations are completed by the independent Fund Administrator for each of the funds under our management. Such calculations are reviewed and verified prior to release.

## Angebotene Assetklassen:

### 1. Equity

Style	Regionen	Global	Europe	Germany	U.S.	Japan	Asia, Pacific	Emerging Markets	Andere
Aktiv / Passiv (auch ETFs)		X/-	X/-	-/-	X/-	X/-	X/-	X/-	-/-
Quantitativ/Qualitativ		X/X	X/X	-/-	X/X	-/-	-/X	-/X	-/-
Small Cap/ Large Cap		-/-	X/X	-/-	X/-	-/X	X/X	X/X	-/-
Growth/ Value		-/-	-/-	-/-	-/-	-/-	-/-	-/-	-/-
Absolute / Relative Return		X/-	-/-	-/-	X/-	-/-	-/-	-/-	-/-
Factor Investing		-	-	-	-	-	-	-	-
ESG-Ansatz / Impact Investing		-/-	X/-	-/-	-/-	-/-	-/-	-/-	-/-

\*Europe CO<sub>2</sub>

### 2. Bonds

Style	Regionen	Global	Europe	Germany	U.S.	Japan	Asia, Pacific	Emerging Markets	Andere
Staatsanleihen		X	X	X	X	-	X	X	-
Corporate Bonds		X	X	X	X	X	X	X	-
High Yield		-	-	-	-	-	-	-	-
Convertible Bonds		-	-	-	-	-	-	-	-
Absolute Return Strategien		-	-	-	-	-	-	-	-
Inflation Linked Strategien		-	X	X	X	-	-	-	-
Geldmarktstrategien		-	-	-	-	-	-	-	-
ESG-Ansatz bzw. Impact Investing		X	X	X	X	X	X	X	-
Andere: Hybrid Corporates		-	X	-	-	-	-	-	-

### 3. Alternative Investmentlösungen

Eric Sturdza Investments is managing a Long short Global equity fund (asymmetric beta), the Strategic Long Short Fund, in partnership with Crawford Fund Management Ltd.

#### Erläuterung zu den angegebenen Produkten bzw. Strategien:

Our institutional offering today includes large, small and mid-cap European equities, US equities, a Global long short strategy (asymmetric beta), as well as emerging Asian equities, Global developed equities, multi-asset strategies, bonds and corporate hybrids bonds.

#### Erläuterungen zu Research/Investmentprozess:

Each of our high conviction capabilities is managed by Portfolio Management teams that have their own regional or sectoral expertise, all of which have extensive, compelling track records, in several cases dating back decades. The research and investment process therefore differs from strategy to strategy that is always high conviction, very active, and concentrated.

#### Inwieweit werden ESG-Ansätze und -Faktoren in den Investmentansätzen integriert?

As an asset manager, we believe we can actively contribute through the investment decisions we make and engagements with the companies we invest in. We aim to allocate capital to companies that demonstrate strong environmental, social and governance (ESG) credentials,

or those transitioning their business to fully integrate ESG considerations.

Accordingly ESG considerations are a component of the fundamental research processes adopted by the portfolio management teams appointed to our funds.

Very strong CO<sub>2</sub> emission track record in European equity.

#### Worauf liegt Ihr Fokus im Jahr 2025?

We are strengthening our institutional offering by expanding our capabilities in CO<sub>2</sub> emission European equity, taking into account the latest developments in the US, and we will continue to enhance our expertise in fixed income, particularly in hybrid offerings for institutional investors. Additionally, we are advancing our work on factor-based risk models and increasing our research capacity in asymmetric beta global long short strategies.