KENDRIS

Collaboration between KENDRIS and Globalance:

KENDRIS introduces new approach to investment portfolio analysis and reporting

KENDRIS, the leading Swiss advisory firm for family offices, trust and fiduciary services has partnered with Globalance Bank, a pioneer in the area of sustainable and future-oriented investments. Using «Globalance World», an interactive digital globe for investors, KENDRIS' «eInvestmentReporting» will provide clients with a novel holistic investment portfolio analysis taking into account ESG, climate change, megatrends as well as ecological footprint. Adrian Escher, Chairman of the Board of Directors at KENDRIS: «With this forward-looking step, we combine our highly developed analysis and reporting tools with the fascinating and unique options provided by sustainability expert Globalance Bank, so offering our customers a new dimension in investment portfolio analysis».

Globalance Bank, a pioneer in futureproofing and sustainability for financial products, uses globalanceworld.com to analyse and evaluate thousands of listed companies and selected indices in terms of sustainability, ESG, climate change, and megatrends. The platform is impressive, both in the way it offers new standards in the visual presentation of «big data» and because of its numerous interactive options for users. This in turn makes it possible to better understand the complex interconnections between financial investments, to methodically analyse existing investments, and to make responsible decisions on further investments and make the investment tangible.

KENDRIS combines this holistic analytical view with its new collaboration partner, to add another level to its own analysis and reporting tools. With digital securities accounting and interactive «eInvestmentReporting», KENDRIS is increasingly targeting institutional investors, CFOs, and supervisory bodies and to this end offers an innovative solution for portfolio analysis from both the fiduciary and accounting perspectives. The company can therefore combine information from various accounts and portfolios for its customers, using interfaces developed in-house for the leading banks to create a comprehensive financial data source from the consolidated data. In turn, this supports the preparation of various customer-specific analyses, reports or additional statements for legal, regulatory and tax purposes. This consolidation and reporting solution is in high demand from family offices, pension funds, investment advisers, asset managers and insurers who can now also review, analyse and monitor their situation using all of the power of ESG in terms of environmental, social and governance aspects.

For any questions, media professionals please contact:
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About KENDRIS:

KENDRIS is the leading Swiss partner for family offices, trust and fiduciary services, national and international tax and legal advice, accounting, outsourcing, aviation consulting and art management. For private clients, KENDRIS provides wealthy individuals or families (including families with their own family office) a wide range of solutions for daily business transactions, including financial and regulatory matters. For business customers – from owner-managed companies and start-ups, to SMEs, to large group companies – we provide comprehensive services, especially in the areas of accounting, payroll, taxes and complex accounting issues. For institutional clients, such as banks, insurance companies, asset managers, funds and other financial intermediaries, KENDRIS works with its subsidiary KENDRIS Capital Ltd. to provide alternative investment fund solutions. KENDRIS AG is fully owned and operated by its own management and employees. The company employs around 170 specialists at its headquarters in Zurich and its locations in Aarau, Geneva, Lucerne and Zug, and overseas offices in Larnaca (Cyprus), Dubai (United Arab Emirates), Great Britain, Luxembourg and the US. For more information, visit: www.kendris.com and www.kendriscapital.com

About Globalance Bank:

Globalance Bank is a private Swiss bank founded by Reto Ringger, which invests in future issues with a positive footprint. These means systems and companies that are responding successfully to and benefiting from global megatrends. With its Globalance Footprint® product, Globalance was the first bank in the world to provide a visual presentation of the impact of assets on the economy, society and the environment. In January 2020, Globalance launched a world first in private banking and, instead of providing customers with standard asset reporting, created a personalised customer magazine with individual content for each portfolio and individual investments. This breaks new ground and makes financial investing easier, more personal, and more tangible for customers. In September 2020, Globalance launched another world first with Globalance World: in the form of a digital and interactive globe for investors, anyone interested in finance can analyse and assess the future viability and sustainability of thousands of listed companies and selected indices with regard to their sustainability, ESG and climate change, among other factors. Globalance advises private clients, families and foundations on how to invest their assets for the future. The bank is 100 percent free of any legacy issues and is managed by the founders. Globalance Bank was named Switzerland's Best Bank in Private Banking by the business magazine BILANZ in 2019.
For more information, visit: www.globalance.com