

The IST services platform – customized solutions for pension funds

A further strategic objective of IST is to provide Swiss pension schemes with customized investment solutions available on the successful, tried-and-tested IST architecture with its cost-saving service platform.

Large pension schemes can combine forces to launch new investment groups (“club deals”) to cover their investment needs in niche segments in particular. This gives them the opportunity to jointly define the investment policy and guidelines for a given product and to play an active role in the selection of the responsible portfolio manager. Participating Swiss pension schemes of all sizes can profit from pooling pension assets. Besides exploiting economies of scale, cooperating pension funds can tap into pioneering ideas as they implement novel and sometimes alternative investment ideas and exchange information and

know-how. The success of the broad-based portfolio manager selection process used for many years by IST speaks for itself. It also continually monitors mandated portfolio managers and their performance. A manager who fails to meet performance targets will be replaced following consultation with existing investors, thus avoiding a costly switch to another provider.

The advantage of IST being a 100% independent not-for-profit organization is that it shares the same interests as the pension funds: The best possible investment solution at the best possible conditions.

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