



*"More than advisors,
we are lifetime partners"*





"Tradition & Durability"



Bally Capital Advisors AG has been founded in November 2003 by Jacques Bally following a career of more than 20 years working for private banking desks of prestigious banks in Geneva and Zurich.

Bally Capital Advisors AG is a member of the Swiss Association of Asset Managers (SAAM) and the Groupement Patronal des Gérants de Patrimoines (GPGP), which is the oldest association of Asset Managers in Switzerland. The GPGP is an exclusive committee that comprises some of the oldest and most traditional families in Geneva.

The Bally family members are descendants of the "Dame Royaume", an iconic and heroic figure who played a crucial role in the battle that Geneva led against the invasion by the Duc de Savoie Charles-Emmanuel in 1602. Descending from a long-lasting lineage, the Bally family members always bear in mind a long-term investment horizon. They are aware that when one gets involved in the investment universe, being short-sighted can only lead one to misfortune.

The main activity at Bally Capital Advisors AG is wealth management for High-Net-Worth Individuals. We are safeguarding our customer's capital and controlling risks. These are our primary concerns when it comes to investment management.

We put a strong emphasis on value stocks and our analytical and fundamental research aims at finding companies that will remain in our customer's portfolio for a few years. We will continue to devote our time to deliver strong results to our investors while always bearing in mind the focus on capital preservation.

Bally Capital Advisors takes pride as an Independent Asset Manager to provide diversified and unbiased advice to its partners. The current financial regulatory framework is getting more and more complicated worldwide. Therefore, we, Bally Capital Advisors, make investors' life easier by leading them through this sinuous and tangled bureaucratic path.

"We are more than advisors, we are lifetime partners."

Jacques Bally, Chairman and CEO





*“Successful investing professionals
are disciplined and consistent
and they think a great deal
about what they do and how they do it”*

Benjamin Graham





Our Services



1. ■ Wealth Management

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2. ■ Asset Management

Bally Capital Advisors has created investment vehicles to satisfy the portfolios' needs and hedge systemic risk. Our objective is a long-term and steady return while avoiding risky positions. We put a strong emphasis on value stocks and our analytical and fundamental research aims at finding companies that will remain in our customer's portfolio for a few years.

3. ■ Multi-family office

Families have special needs and we are here to simplify all the struggles that one can encounter. Our company offers services comprising financial planning, governance, and advisory. Bally Capital Advisors is a family business, and the Bally family is in a position to understand and curate tailor-made solutions for every need. Specifically, we provide consolidation services, concierge services, global wealth analysis and advice, succession planning, and connection with specialists (M&A, etc.).

4. ■ Swiss Mining Institute

The Swiss Mining Institute is a valuable resource for investors interested in the mining industry. It offers a range of services including research on mining stocks, analysis of mining companies, and guidance on investment opportunities in the mining sector. The institute also hosts seminars and webinars on mining-related topics.

Bally Capital Advisors AG's mining investment platform is based on a deep understanding of the industry and the opportunities that exist within it. The company has a team of experienced professionals who specialize in mining investments and have a track record of successful investments in the sector. Through its expertise, the company has built a strong network of contacts across the mining industry, which it leverages to identify opportunities for investment.





*“Stones have no hope of being
anything but stones. However, through
collaboration they, get themselves together
and become a Temple”*

Antoine de Saint-Exupéry





Investment Expertise

Research on value stocks



We possess a research service that assesses companies that can qualify as "Value Stocks". These types of companies have solid financial statements, have been established for a long time, their market capitalization is over 5 billion, and are their respective industry leaders.

Long proven expertise



Our Portfolio management team is composed of 4 professionals that hold over 100 years of experience within the financial markets with a strong focus on the USA, Europe, and Switzerland. We are well aware of our boundaries but also know how to behave in the markets. Our expertise allowed us to prevent financial loss from the 2008 crisis.

Automated stock screening



We own an in-house algorithm that assesses a stock's potential uptrend and its key metrics. If a stock is negatively evaluated, we don't invest in this one. This process removes all emotional bias such as an attachment to a specific company or a wrongful judgment.

Diversification



It is widely known in the financial industry that investing in precious metals and the mining industry serves the purpose of hedging a portfolio in case of a downturn market. We are experts in this niche market. We will get you the right exposure to avoid extreme financial loss.

Selection of trustworthy funds

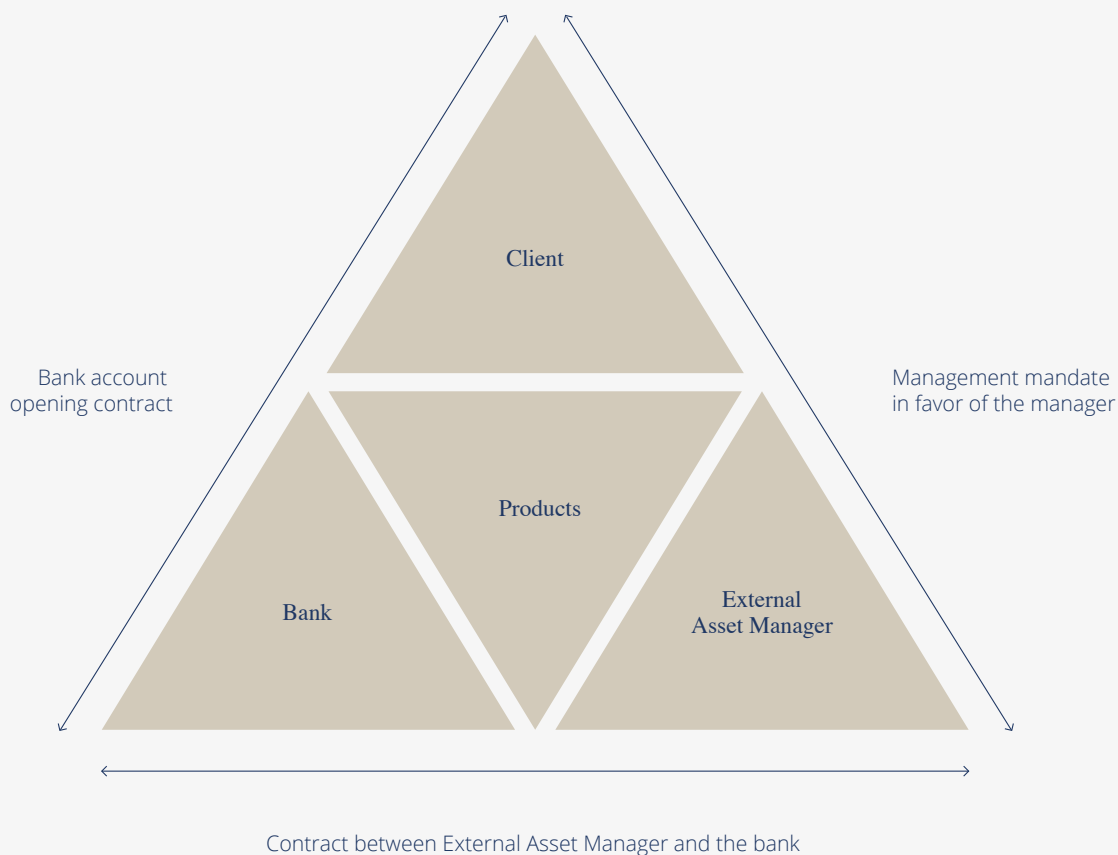


To gain access to specific markets or products, it is inevitable to invest through funds. We only invest in funds whose managers are reliable acquaintances know for decades and where the funds are highly liquid.





Tripartite Banking Relationship



▲ The Client

You can start a banking relationship with one of the custodian banks and give your independent wealth manager permission mandate to manage your investments on your behalf, yet without using the assets you own.

▲ The Independent Wealth Manager

Your assets are managed by your independent wealth manager, and together you collaborate to determine the most effective strategy to attain your shared goal of maximizing your financial wealth.

▲ The Bank

Our team of specialists is dedicated to providing you personalized support to you throughout the entire process of creating a banking relationship. You can benefit from our extensive banking expertise and relations in areas such as market analysis and account administration. Additionally, you will have access to a secure IT platform that allows you and your manager to monitor the progress of your portfolio positions through individual account and deposit reports.





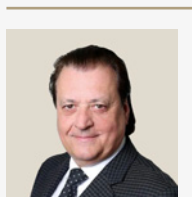
Executive Team

Wealth Management



Jacques Bally
(Chairman & CEO)

is the founder of Bally Capital Advisors, which was created in 2003 after 22 years of experience in Private Banking in Geneva and Zurich. He previously held top management positions within Latin American Private Banking Desks. Jacques Bally graduated from the University of Lausanne, Switzerland. He is fluent in French, English, Spanish, Portuguese, Italian, and German.



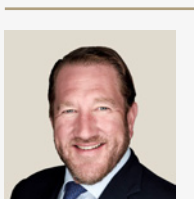
Racheleano Mecozzi
(Director)

is the Business Development Manager for Swiss and Latin Europe. From 2005, he worked as Manager of Anker Bank S.A./BCGE Lausanne Branch and Senior Wealth Manager. In 2008, he was promoted to Director and worked there until 2012. From 1999 to 2005, Racheleano Mecozzi was the Manager of the Swiss Private Clients Office at the BCGE headquarters. From 1987 to 1999, he was the Manager of the BCGE branches in Molard-Genève and Chêne-Bourg, in charge of the commercial and financial market activities. Racheleano Mecozzi has more than 40 years of experience and knowledge in the banking sector. He has joined Bally Capital Advisors S.A. in February 2019.



Anatol Nikiel
(Relationship Manager)

graduated from one of the top hospitality schools in Switzerland with a Specialization in Finance and Business Management. He started his career with Bally Capital Advisors in 2020 as a junior portfolio manager, where he established effective investment model portfolios based on market dynamics, and strategies valuations. With his background in hospitality, he has always been keen on forming close and transparent client relationships. Thereafter, showing strong leadership and a drive for keeping good relations with the clients he is now working as a relationship manager. Through this position, he achieved new investment horizons and opened new market clientele for the company.



Xavier Rubio
(Director)

is the Head of Wealth Management, responsible for business development and sustainable client solutions. Xavier has 20 years of experience in the Financial Industry and has worked at Barclays Private Bank Switzerland, BCGE Lausanne, and other External Asset Managers. He holds a bachelor's degree in finance and is certified in Financial Planning. Xavier lived in 4 different countries and speaks fluently French, Spanish, English, and German.



Fausto Tartaglione
(Administration)

has worked for more than 30 years in the banking sector, particularly in retail banking, as a Senior Advisor for private clients and SME, and then as an Office Manager for Swiss well-known banks in Geneva. He is still now an assessor for the final exams of apprenticeship in the banking sector and was a neutral assessor for the final exams for Business Schools until June 2015 and apprentice commissioner until December 2011.





Executive Team

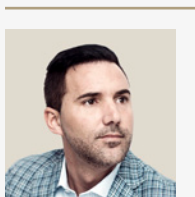
Compliance



Marc Perut
(Compliance Officer)

has more than 15 years of experience in corporate banking and corporate financing, from holding various positions at 'Credit Suisse' and 'CSFB' in Geneva, Zurich, Frankfurt, and Amsterdam. In addition, he worked on global projects for EFG International. Marc Perut has been working as an advisor for European and Asian companies on their business development. Marc holds an MBA from SDA Bocconi in Milan and a Certificate of Advanced Study from EPFL. He is fluent in French, English, German, and Dutch.

Mining Activities



Manuel Bally
(Mining Activities Manager)

graduated 'Cum Laude' (with honors) from Lynn University with a Bachelor of Business Administration (B.B.A) degree. Mr. Bally has been recognized for Academic Excellence throughout his studies. Before launching the Swiss Mining Institute in 2012, Manuel Bally represented Bally Capital as an Investment Manager in the Mining industry. He is fluent in French, and English with some knowledge of Spanish and Italian.



Sarah Bouchisse
(Deputy Manager)

obtained her master's degree from a French Business School, majoring in Management and Finance. After 4 years of experience in Marketing, Financial Analysis, and Private Banking, she has joined our team as an Administration Manager and Asset Management Assistant. She is fluent in French and English and has a working knowledge of Italian and German. Since 2019, she is taking part in the organization of our Mining Conferences.





*“Capital preservation is our foremost
and ultimate goal”.*

Jacques Bally (Chairman & CEO)

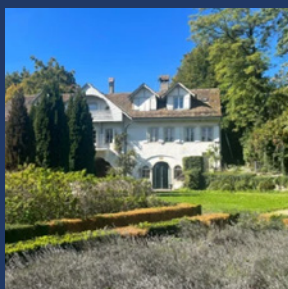




Contact



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