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Herculis Partners

Herculis Partners SA is a wealth and investment boutique which specialises in providing added value to high net worth individuals, family offices, charities and endowments through a responsible business approach. We invited Board Member Nikolay Karpenko to explain the company's innovative approach in more detail.

Established in 2009, Herculis Partners operates across the wealth and asset management and investment banking industries, taking into account the principles of ethics, transparency and performance to provide strong, secure returns for investors. Nikolay outlines how this is achieved through its investment strategy.

"Herculis Partners provides wealth owners with easy access to unique set of alternative investments like hedge fund, private equity fund, wine and precious stone investments in order to preserve and multiply their capital. Our approach revolves around making alternative investments as accessible, liquid and cost effective as much as possible.

“All of our products are **completely different** from what our competitors are offering.”

"All of our products are completely different from what our competitors are offering. The key advantage to working with Herculis Partners is that investors join us in our investments and share with us all risks and rewards. The core area of our business development is our Sharia-compliant Fund with elements of social responsible investments as well as Global Water Fund and Trade Finance Fund.

"Another key differentiating factor is that we invest our own capital at the beginning and only then propose to our clients to join us. We call this approach an alignment of interests and it ensures that our staff are personally invested in ensuring that our investment products are profitable and risk averse."

Throughout the financial market, new trends and regulatory environment changes are providing challenges for everyone in the industry. In these circumstances, Nikolay sees the firm's main tasks as helping the wealth owners to increase wealth through VC and PE Investments and M&A deals,

to preserve and multiply wealth through passive and active operations on global securities markets, to protect wealth from states, creditors and raiders and pass it on successors and to distribute wealth on environmental and society needs according to customers' altruistic ideals and values.

"Our core business focus is alternative investments, a class of assets which includes hedge funds, private equity funds, venture capital funds, commodities, derivatives, property, wine, art, antiques, coins, diamonds, stamps and other non-conventional investment instruments. These products are attractive to investors mainly because of their low or negative correlation with standard class of assets like stocks and bonds. But alternative investments may be relatively illiquid and sometimes it may be difficult to determine their current market value. Also, there may be limited data about historical risk and return as well as exist relatively high costs of purchase and sale.

"Today, investors are more familiar with alternative investments than they were 20 years ago. Hedge fund, PE and VC fund industries are growing fast and absorbing huge amounts of money. Clients are looking for low volatile instruments but with attractive returns in conditions of low interest rates when all securities markets are overvalued. The allocation of alternative investments in their portfolios is achieving 15-20%. This offers firms such as ours a big opportunity to strengthen relationships with the clients as they are becoming keen on alternative investments.

"Overall investors are generally fairly cautious about alternative investments but when you talk to them about precise and concrete subjects, they are ready to be committed and involved. Recently investors have become increasingly keen to invest in tangible items with substantial intrinsic value such as real estate, art works, wine, coins or precious stones, and as such we have been moving into these areas, supporting clients using our vast sector experience to ensure that they make the best possible investment decisions."

Looking to the future, Nikolay discusses the firm's move into physical banking as it offers clients the option to rent the equivalent of a safety deposit box for their valuables.

"Herculis Partners has finished the reconstruction of Herculis House, our dedicated bank, and opened its own safe vaults with duty-free status in order to keep in custody clients' precious stones, wine and art of works on low profile basis. Also, a client can save 8% on custom duty tax payment by placing physical assets under duty-free regime, keeping their assets and goods under this regime for as long as they need to. The strong custody measures we have created meet security and resistance level comparable to a top banking vault, offering clients the security they need. This is a new venture for us and we are excited about the opportunities it will afford us.

"Alongside this, the firm is also keen to expand geographically and support clients in new regions. Currently Herculis Partners SA has three offices in Switzerland: Porrentruy, Geneva and Zurich. Our ongoing strategy involves obtaining a strong presence in Dubai over the coming years, with a focus on investment and business opportunities not only in GCC region but also on the African continent, where we can see a big potential for private equity investments."

