

Lapis

Dashboard Q4 2024

02 Comments and Activities **03** Details Analysis





Comments

Overall search volume grew by 90% in 2024, reaching 787 million CHF. Tender volume since early 2023 crossed 1.2 billion CHF.

Balanced and Equity profiles emerged as the most significant risk categories, with Balanced risk seeing 731% growth and Equity 45% growth in 2024.

Private client search volume totaled 435 million CHF since 2023, with an average RFP size 3) Keep company descriptions short & updated of 2 million CHF. 2024 saw a strong surge in interest from pension funds, family offices and foundations driving the institutional client business to new heights with over 600 million CHF.

A total of 90 million CHF was allocated via standing offers in 2024.

Please find below the Dashboard review for the past 4 quarters. The RfP data is based on searches that have been concluded by end Q4 2024. You find our recommendations in the Over 25m in RFP's added and over 25m also in SO wins. column on the right and we are looking forward to discussing the results and next steps with you.

Recommendations

The following elements can be linked to a successful journey for new mandates on the ZWEI Wealth platform. We recommend you regularly review these and where needed, contact us for support:

1) Submit Standing Offers to stand out and promote your best solutions

2) Keeping your Standing Offers up-to-date and relevant

4) **USP** – what is truly unique, what are the 3 things an investor must know (not 30 things) 5) Carefully read the **RFP specifics** before submitting an offer – come across authentic

Overall the relationship is working very well and Lapis remains one of the most successful providers on our platform. With now over 30% invitation ratio for RfP's and 14% win ratio, the company understands our model very well. The 25 SO's also continue to attract leads and we recommend to continue to update the offers and regularly review them.

Next Steps

What

Update Standing Offers

Wealth Office Conference 2025

(Zurich 11/12 June; Geneva 17 June; London 18 June)

Lapis specific steps

Review & Update Standing Offers



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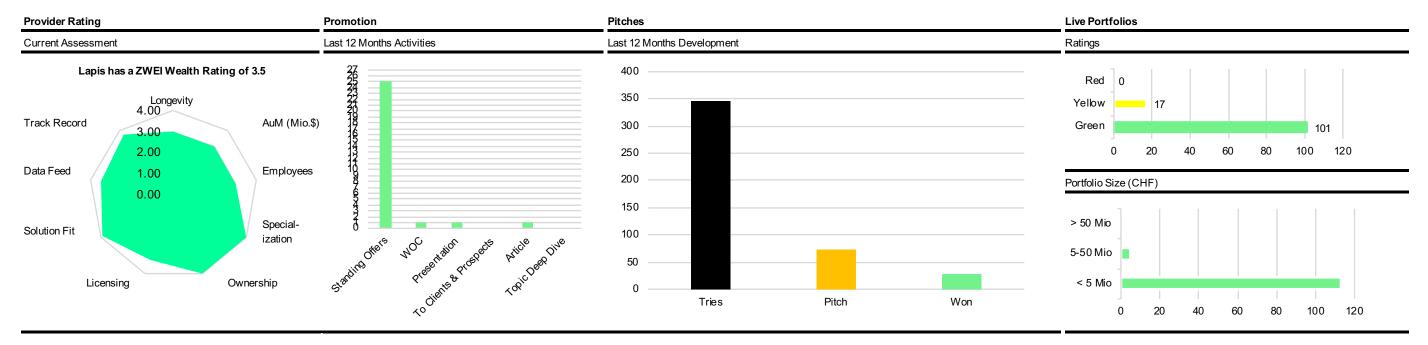


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By when
Feb 2025
June 2025
Q1 2025

Details Analysis

Lapis	Q1 2024				Q2 2024				Q3 2024					Q4 2024				YTD 2			
Promotion	Count	Reach	Leads		Count	Reach	Leads		Count	Reach	Leads		Count	Reach	Leads		Count	Reach	Leads		
To Experts																					
Standing Offers		21	45	38	2	21	45	118	22		45	49		25	46	36		25	46	241	
WOC		0	0	0		1	128	81	C		0	0		0	0	0		1	128	81	
Presentation		0	0	0		0	0	0	1		45	32		0	0	0		1	45	32	
To Clients & Prospects																					
Article		0	0	0		1	765	23	C		0	0		0	0	0		1	765	23	
Topic Deep Dive		0	0	0		0	0	0	C		0	0		0	0	0		0	0	0	
TOTAL		21	45	38	2	3	938	222	23		90	81		25	46	36		28	984	377	
Conversion into leads	_			84.4%			2	3.7%				90.0%				78.3%				38.3%	
Pitches	Tries	Pitch	Won		Tries	Pitch	Won		Tries	Pitch	Won		Tries	Pitch	Won		Tries	Pitch	Won		
	#	#	#	;	#	#	#		#	#	#	į	#	#	#		#	#	#	Volume	e CHF
Standing Offers (Selected)		38	8	8	11	8	12	4	49		10	1		36	4	0		241	34	13	25'610'000
RfP's		16	6	3	3	80	14	6	42		13	5		17	6	1		105	39	15	27'500'000
TOTAL		54	14	11	14	8	26	10	91		23	6		53	10	1		346	73	28	
Conversion %		2		20.4%		-	.6%	6.8%		2	25.3%	6.6%			18.9%	1.9%			21.1%	8.1%	
Live Portfolios (with Datafeed)	Green	Yellow	Red		Green	Yellow	Red		Green	Yellow	Red		Green	Yellow	Red		Green	Yellow	Red		
	#	#	#		#	#	#		#	#	#		#	#	#		#	#	#	Volume	CHE
< 5 Mio		71	16	0		0	12	1			19	1		97	16	0		97	16	0	103'510'762
5-50 Mio		3	1	0		2	2	0			2	0		4	1	0		4	1	0	42'834'200
> 50 Mio	_	0	0	0		0	0	0			0	0		0	0	0		0	0	0	0
TOTAL	-	74	17	0		2	14	1	75		21	1		101	17	0		101	17	0	146'344'962
TOTAL %			8.7%	0.0%	77.6%			1.5%	77.3%		21.6%	1.0%			14.4%	0.0%		85.6%	14.4%	0.0%	



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