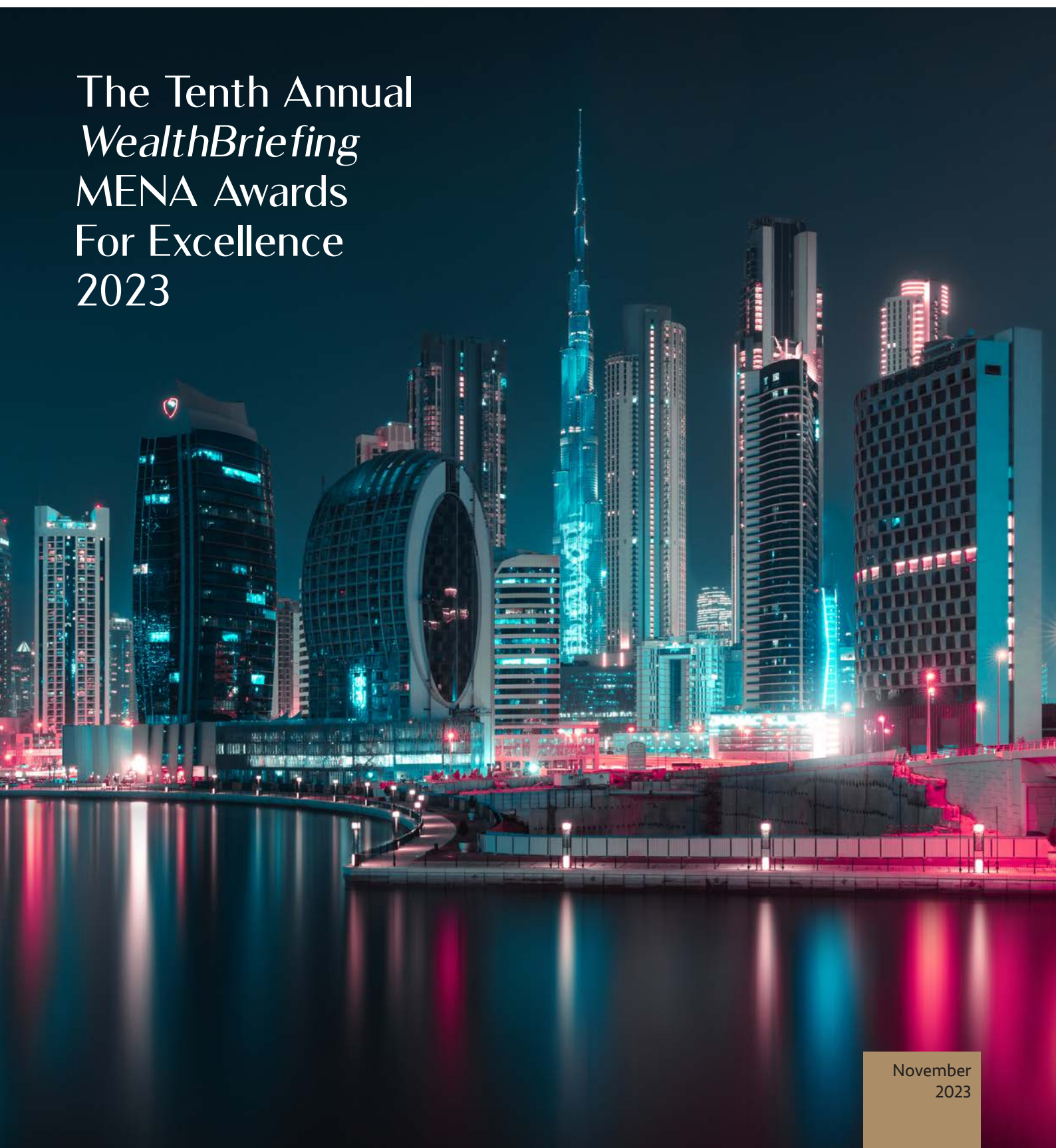




# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
THROUGH THE *WealthBriefing* AWARDS PROGRAMME

The Tenth Annual  
*WealthBriefing*  
MENA Awards  
For Excellence  
2023



November  
2023





WINNER  
Overall External Asset Manager

CdR Capital Limited (CdR Dubai)

### CdR is about people.

With 32 people across our 3 locations, we are proud to have a broad range of individuals across 17 nationalities, speaking 14 different languages, with an average of over 23 years' of experience each. CdR has excellent people, whose sole focus is on achieving the best outcome for clients.



Leading By Example.

# Success Through Recognising The Importance Of Client Needs



## CdR Capital

### Please explain why you think our team has achieved a high level of success.

We believe in our people and the processes that we have put in place, both for idea generation as well as executing those ideas. We do the simple things well, the complex things really well! We have developed a robust investment process that allows us to build long term portfolios for clients that achieve their desired risk and return objectives, often from non-correlated sources of returns.

### What challenges have you had to surmount to get to this point?

As independent wealth managers, CdR came into the market in the GCC well before others. This meant that there was a long education process for clients to understand the model of CdR versus being used to working exclusively private banks. Families are now familiar with fact that independent advisors can be complementary to the banks' service proposition, but this has taken time.

They now see that our independence aligns us more closely with our clients. Our success in the region has been mainly through word of mouth and client referrals. We are very happy that the EAM business is now growing so strongly in MENA - We welcome the competition! We have learned in Switzerland via the ASWM that, whilst we are all competitors, there is strength in numbers and as our market expands we can all win!

### What has led to your firms success and what role did your colleagues play?

We make sure to lead by example in our industry when working with our clients, with other service providers and amongst ourselves as a team. Collegiality and intellectual rigor are our most powerful assets. From the investment side, we service individuals and families institutional client mind set and models.

We are a people business and our diverse, collective experience within the firm means that we can service the needs of all clients by working together as a team. That said, we have never been



frightened to steer clients away from an asset class that we consider to be too speculative for their needs or the current market cycle.

### Explain what benefits you and your colleagues get from these awards.

It is a great honour to be awarded best EAM in MENA, for which we are grateful to the selection committee. Any third party validation is helpful to a small business such as ours and hopefully explains our steady growth in client numbers during the past ten years.

### Where in the world do you operate are you mainly a domestic player or international?

We have offices in Geneva, London, and Dubai. At the start of our firm, over ten years ago our first clients insisted that we would build a presence in Dubai. We have been amazed that Dubai has since become far more than the gateway to the Middle East but is now home to international traders and investors, crypto communities, and Next Gen entrepreneurs.

### What are your ambitions for the business?

We have been investing into and growing our presence across all of our offices given idiosyncratic opportunities which exist in Switzerland, London and the UAE. We have had success particularly in Dubai where our ambition is to keep attracting like-minded professionals who have both market knowledge and client experience. We talked about leading by example, and we want to be the example used in the region when talking about world-class independent investment advice.