



DAUGAVA FINANCE SA

DAUGAVA FINANCE SA has been built by entrepreneurs linked by common values and a shared history. They have created an innovative structure to provide independent, impartial and effective solutions to some of the challenges facing families, businesses and entrepreneurs.

Over the decades, we have helped our clients grow their businesses, preserve their wealth, seize opportunities and ensure the prosperity of future generations.

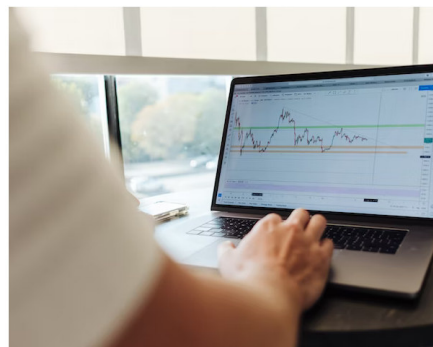
Today, DAUGAVA FINANCE SA is a trusted and dedicated partner for customers around the world.

We offer you another way to manage your wealth, assets and investments. We provide investment banking advice and assist you with your business needs. Our personalized approach means that one person works closely with you at all times, while our independence allows us to design dedicated solutions based on your specific needs and goals.

Fully regulated, we have successfully crossed several generations and extended our reach globally. We understand what entrepreneurs and families need to be successful, because that's how we've built our own success.

We offer a personalized asset management service, which includes:

- Defining an investment profile for each client and developing strategic and tactical asset allocations based on that profile.
- Using our proven, structured approach to create a well diversified asset portfolio that delivers strong, sustained growth.
- Allocating assets to third party managers in line with the investment strategy, with a speciality in selecting private equity opportunities where our corporate finance expertise is advantageous.
- On-going risk management and monitoring of investments, with adjustments to asset allocation as necessary.



INTEGRITY & SERVICES



As your trusted financial concierge, we partner with you to understand, simplify, and coordinate your complete personal financial life, adding security and clarity in the reporting we provide. We achieve this by monitoring four distinct areas of your finances.

Providing professional family office services and sustainable strategies highlights two of the best qualities we can give our clients – Integrity and Service. These words can become either a cliché or a mantra. We believe the latter. Serving you with integrity is at the heart of everything we do.

The interests of the family are not the only priorities of external financial institutions. They have to deal with conflicting interests like challenges due to constantly increasing regulatory pressure, the demands of the share holders, customer interests and competitive pressure. We have many years of experience in the financial industry, for example with regard to standard market conditions, regulatory requirements and service quality.

We guide you through every phase of your financial life: from developing your wealth to achieve what is important to you, to transitioning assets to future generations. We partner with you and act in your best interest to ensure your long term financial success.



WEALTH PLANNING



ANALYSIS



PORTFOLIO

Responsible investment, which was a niche segment until a few years ago, is now highly prized by many of our clients and occupies an increasing place in our approach. At DAUGAVA FINANCE SA, we are firmly convinced that the integration of environmental, social and governance (ESG) considerations in our investment processes, but also our active engagement with companies, as well as a particular attention to the various implications of our investments, are essential for improving risk - adjusted performance over the long term.



OUR VALUES

The care for our clients extends beyond their holdings because we truly understand their needs and priorities. We establish long-lasting relationships built on mutual trust. Client-oriented: our approach centres on understanding and fully integrating what solution best responds to your needs, and developing our offering in consultation with you. The combination of our family dimension, a client-centred approach and financial expertise allows us to provide a strong foundation upon which to build close and long-lasting relationships with you. Conviction: the long-term vision allows us to make choices based on strong convictions. This key value has been a driving force for the growth of our company as well as that of our customers.

