

Media Release

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Bellevue expands its product offering in the field of private equity

Bellevue Group AG is strengthening its private equity arm with the launch of the BB Entrepreneur Private strategy, an investment vehicle focused on growth financing for small and mid-sized Swiss companies. Following the successful closing of the venture capital firm BB Pureos Bioventures in September of 2020, Bellevue is now launching a new initiative to strengthen the Swiss SME landscape.

Swiss SMEs (small and mid-sized enterprises) are known for their strong innovation skills and they often offer long-term growth potential with high margins. This is all the more so if the SME is a family or an owner-managed business. Until now, however, it has been difficult for investors to gain access to the Swiss SME market because of a lack of suitable private equity (PE) vehicles. With the launch of BB Entrepreneur Private, a private equity fund established in collaboration with prominent business families, Bellevue can now offer qualified investors a vehicle for investing in fast-growing Swiss SMEs.

Bellevue employs teams of competent professionals with many years of experience in the fields of private equity and family-run or owner-managed companies. This enables it to anticipate new opportunities at an early stage, and provides investors with access to innovative, value-creating investment solutions beyond the mainstream.

Bellevue's acquisition of the private equity boutique adbodmer AG in the summer of 2019 expanded its investment expertise significantly. As an established player in the PE business with an excellent network of business contacts, adbodmer specializes in direct equity investments, constructing exclusive investment opportunities that it skillfully oversees until an exit is arranged. Selective cooperation between Bellevue Asset Management and adbodmer increases the flow of high-quality deals and enhances value creation.

The acquisition of adbodmer marked another milestone in the steady acceleration and expansion of private equity investment activity within Bellevue Group. It is regularly adding highly qualified experts to the team. Thanks to its existing international network, access to private equity investments can be offered to a wider circle of clients. This creates the basis for the selective expansion of the company's private equity activities across the DACH region.

“Combining the best of both worlds”

The BB Entrepreneur Private Strategy offers Swiss investors the opportunity to invest in promising fast-growing Swiss SMEs alongside prominent business families and lead investors. The investment universe consists of “hidden champions,” profitable and mostly debt-free businesses that have strong competitive advantages. These companies are run by very capable management/ownership teams with sound growth plans and midterm exit plans. adbodmer is in a unique position to provide these “hidden champions” with the capital they need to implement their growth strategies while ensuring that the entrepreneurs retain control and flexibility.

adbodmer develops and oversees exclusive private equity investment opportunities and BB Entrepreneur Private belongs to adbodmer's select group of investors. The portfolio management responsibility – and thus the responsibility for making the investment decisions – lies with Bellevue Asset Management.

Andre Rüegg, CEO of Bellevue Group, comments on the launch of the new investment vehicle: “We're pleased to close a gap in the market with the launch of BB Entrepreneur Private. Through our adbodmer subsidiary, we have a highly experienced team of private equity specialists at our disposal. Together with Bellevue Asset Management's vast expertise in entrepreneur investment strategies, we have combined the best of both worlds and created an investment vehicle for qualified investors that was lacking until now.”

www.bbentrepreneurprivate.ch

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Bellevue Group

Bellevue Group is an independent Swiss financial boutique specializing in asset management. Established in 1993 and listed on the SIX Swiss Exchange, the standalone asset manager has about 100 employees and is focused on a diverse, award-winning range of investment solutions in the three areas of specialized healthcare strategies, alternative investment strategies and traditional investment strategies.

adbodmer

adbodmer was founded in 2001 and is based in Wollerau. It serves as a direct investment developer, facilitator and advisor, focusing on SMEs in German-speaking Europe (DACH region). adbodmer builds bridges between promising growth companies and an exclusive group of investors ranging from UNHWI, families, family offices and wealth management firms.

Disclaimer

Bellevue Group has launched a private equity investment fund under Swiss law taking the legal form of a limited partnership for collective investments incorporated in Switzerland. The information contained herein is directed exclusively to Qualified Investors according to CISA (Collective Investment Schemes Act). Are deemed Qualified Investors according to CISA: Professional Clients according to art. 10(3) CISA in conjunction with art. 4(3-5) or art. 5(1 and 4) FINSA (Federal Act on Financial Services) and Retail Clients according to art. 10(3ter) CISA in conjunction with art. 6a CISO (Ordinance of Collective Investment Schemes).

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