



A better way to invest
Harnessing the power of
science-based research,
AI and data-driven insights

A better way to invest with clarity and precision

Opening up smarter alpha sources

Quoniam offers professional investors asset management based on a unique combination of scientific data analysis methods, technological excellence and capital market expertise.

Our purpose is **to create value through innovation and science-based investing.**

With a proven ability to navigate complexity and innovate for results, we empower our clients to achieve their goals in an ever-changing financial landscape.

25

years' experience
in science-based
systematic investing

21

EUR bn assets
under management

120

professionals
in two offices in
Frankfurt and London

A better way to align your ambitions with expertise

Ensuring stability and agility

We are the systematic asset manager of the DZ Bank Group, the second largest bank in Germany by total assets and the central bank for over 700 cooperative banks. Our main shareholder is Union Investment, one of Europe's largest and most successful investment managers. The remaining equity is held by the senior management of Quoniam, with all staff able to participate in a partnership scheme.

This unique structure gives us the best of both worlds. Our ownership is strong, with a long-term view that enables Quoniam to flourish as an independent boutique. We have complete autonomy in the way the business is run, enabling us to drive our entrepreneurial and innovative culture, with a clear vision and values.



German cooperative financial institution network with total assets of EUR 660 bn*

* as of 12/2024

A better way to unleash data-driven potential

Utilising science and AI

Separating signals from noise

Markets are highly competitive. There are no easy wins, but there are many tiny edges to exploit. Our ability to assess economic plausibility and advanced use of data science allow us to identify the signals that matter.



Real world applicability

Implementation matters and theory must be translated into practice. Experienced portfolio managers coupled with highly automated portfolio construction techniques allow us to cost effectively distil conceptual edges into many small, risk-controlled positions.



Adapting as markets change

Capital markets evolve and managers need to adapt to remain effective. Our ongoing proprietary research allows us to evaluate the emergence and persistency of alpha-generating edges over time.



Close cooperation
with academia



Quoniam
Research
Seminars



Quoniam
Doctoral
Programme

A better way to unlock new investment opportunities

Combining research and academics

Research is the heart of our investment platform, with a team that includes widely published Masters and Doctorates in a wide range of disciplines, such as pure mathematics, computational linguistics, engineering and physics.

We constantly research new data-sets and investment techniques that can add additional sources of return or risk reduction for our clients. Our academic partnerships and doctorate programs ensure that our thinking is informed and challenged by a wide pool of intellect.

18
research
professionals

20+
completed research projects
per year

A better way to generate superior returns

Enabling rational and robust solutions

Our empirical approach to data enables us to make rational and unbiased decisions, avoiding behavioural and emotional biases. Our ability to evaluate large volumes of data coupled with our highly efficient automation process facilitates

the simultaneous consideration of multiple investment decisions within and across large investment universes. Combined with highly cost efficient trading that aims to add further alpha, this enables us to create highly diversified and competitively priced portfolios tailored to clients' needs.

50,000+
equities, bonds and commodity
instruments evaluated daily

200+
information points
analysed per security

500k+
calculations per day

Our clients are drawn from around the world and across segments

Pension schemes
42%

Insurers
15%

Non-profit organisations
12%

Financial institutions
10%

Pooled funds
10%

Government authorities
9%

Other
1%

Our investment platform is highly flexible, enabling us to tailor portfolios to clients' needs, including tailored benchmarks, risk appetite and ESG requirements. We are able to quantify precisely the potential return, risk and implementation cost impacts of specific requirements such as company or sector exclusions. While our foundation is rooted in

rigorous, science-based research, we strive to make our insights accessible to everyone. This enables our clients to make informed decisions, regardless of technical expertise. Our goal is not just to show what we do, but why it matters – how we deliver real value by applying scientific rigour and innovative technology to achieve exceptional results.

A better way to deliver real value

Maintaining transparency, flexibility and scalability

A better way to diversify your portfolio

Applying multi-factor models and machine learning

Equities

Across a global universe of over 50,000 securities, we apply a superior range of metrics that are empirically proven to influence alpha. Currently, we have identified over 60 alpha sources that contribute to value, quality and sentiment attributes, which we combine into blended portfolios. Since 2018, we have been using machine learning to increase the model's explanatory power.

Fixed income

We have been managing systematic credit portfolios since 2005, making us one of the pioneers in Europe and a leader in the advancement of systematic credit. Our team has developed a unique multi-factor signal that combines value, carry and momentum metrics. We use this signal to construct portfolios that are far less dependent on the market movements of spreads.

Multi-Asset

Besides traditional balanced mandates, for our liquid alternative flagship strategy, Global Data Sentiment, we are using machine learning to identify key news topics that impact market trends. We identify and act on the 1% of over 50,000 topics and 1,000,000 daily articles that affect markets, getting ahead of the markets and ahead of the game. To maintain our edge, our research team constantly refine our models to ensure we stay ahead of the game.

A better way to achieve exceptional outcomes

Thriving in a dynamic investment landscape

✔ **Data-driven investing**

At Quoniam, data and science power innovation. A team of experts with diverse academic backgrounds harness cutting-edge technology and AI-driven insights to extract meaningful investment opportunities. Proprietary research tools and near real-time analysis of over 50,000 financial instruments are designed to deliver superior risk-adjusted returns.

✔ **Relentless research and innovation**

Research drives everything at Quoniam. The team explores new data sources, evaluates emerging factors, and collaborates with academic institutions to continually refine techniques for alpha generation and risk mitigation. This, evidence-based approach identifies effective return drivers that are applicable to real-world portfolios.

✔ **Advanced alpha engine**

Since 1999, Quoniam has combined factor-based models with machine learning to refine insights and improve outcomes. The integration of dynamic factor weighting and non-linear relationship analysis has consistently enhanced equity returns since its incorporation into our processes in 2018, demonstrating consistent success in evolving markets.

✔ **Tailored portfolios, global reach**

Quoniam's flexible investment platform adapts to clients' specific benchmarks, risk appetite and ESG requirements and our automation ensures scalability and cost efficiency. We have experience serving clients worldwide with portfolios ranging from tens of millions to billions.

✔ **Collaborative and transparent relationships**

Quoniam values collaboration and openness. Portfolio managers work closely with clients to align portfolios with specific objectives, while transparent communication demystifies complex strategies, empowering informed decision-making.

Contact us to find out more about our solutions



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Disclaimer

The use of investment services as well as investments in financial instruments are conjoint with risks. For more information and guidance on opportunities and risks, please visit ➤ www.quoniam.com/risk-information

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