



SFP Infrastructure Partners

14 November 2023 – Dr. Marc Wicki, Dr. Cledan Mandri-Perrott, Thomas Hoffmann

The Visionaries - Partners' Statement of SFP Infrastructure Partners (1/3)

A Fresh Start

It's a cold winter's day in 2021. We, three friends and former Partners Group colleagues, are sitting over a coffee at La Stanza in Zurich, chatting about old times.

Given our infrastructure background, we discussed the impact of the Covid-19 on travel. We agreed that the effects of the pandemic resulted in a bifurcation between the true infrastructure and private-equity-like infrastructure such as billboards, theme parks and camping spaces.

It was interesting to observe how those investments, perceived as infrastructure, had their moment of truth. The once celebrated trophy assets, such as airports, were running at minimum capacity. Theme parks were closed down. At the same time, infrastructure as an asset class received a significant push from the Swiss regulator to encourage pension plans to increase their allocation which at the time was only around 1%.

It is against this backdrop that we felt there was a need to return to "true infrastructure" investments. Given the ever-widening definition of infrastructure in the past years, we agreed that it was crucial to offer investors the authentic infrastructure exposure that aims to bolster portfolio resilience in the face of evolving macroeconomic conditions.

Having spent many years in big thriving organisations, this desire for entrepreneurship and agility led us to recognise that we needed a structure that would allow us to "re-invent" the wheel.

Coincidentally, Swiss Finance & Property Group (SFP) asked us to provide advice on infrastructure as an asset class. As a result of an extensive dialogue, we agreed that it would make sense to join forces to build a dedicated offering responding to the needs of the market, and to turn their real estate business into a real assets platform. During this time, we got to know Hans-Peter Bauer and Adrian Schenker who saw the potential in our way of thinking and decided to back such an initiative. A positive additional outcome was to bring together real estate and infrastructure expertise to strengthen the push towards sustainable property development. The joining forces with SFP was fruitful given the hands-on track record of meeting investor needs on the basis of their agile platform.

That's how our journey started... And stay tuned to learn how we developed in an upcoming episode of the trilogy.

Further information

Dr Marc Wicki
Partner, CEO

SFP Infrastructure Partners AG
marc.wicki@sfpinfra.com

Thomas Hoffmann
Partner, Head Investments

SFP Infrastructure Partners AG
thomas.hoffmann@sfpinfra.com

Dr Cledan Mandri-Perrott
Partner, Head of Strategy &
Investment Solutions

SFP Infrastructure Partners AG
cledan.mandriperrott@sfpinfra.com

SFP Infrastructure Partners

SFP Infrastructure Partners is a Swiss based investment advisor targeting traditional infrastructure investments globally. The firm is fully embedded within Swiss Finance & Property Group (SFP Group). SFP Infrastructure Partners provides access to investments in the sustainable energy, ICT/telecommunications, transportation and utilities sector with the objective of generating attractive risk-adjusted returns for primarily institutional investors. Further information on www.sfpinfra.com

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