

## Disclosure in accordance with Art. 367k PGR

**Asset manager:** Method Investments and Advisory AG

**Institutional investor:** none

**Financial year:** 2025

According to Art. 367k para. 1 PGR, asset managers must disclose annually to institutional investors<sup>1</sup> with whom they have concluded an agreement in accordance with Art. 367i para 2 PGR<sup>2</sup> how their investment strategy and its implementation is in line with this agreement and contributes to the medium to long-term performance of the institutional investor's assets.

Method Investments and Advisory AG is initially only active as an investment advisor and therefore has no institutional investors with whom it would have to conclude an agreement in accordance with Art. 367i para 2 PGR.

Balzers, 09.05.2025



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<sup>1</sup>An 'institutional investor' is defined in Art. 367a(2) PGR as: a) an undertaking which carries out life insurance activities within the meaning Art. 2 para.3 and reinsurance with n the meaning of Art. 13 para. 7 of Directive 2009/138/EC5, provided that these activities relate to life insurance obligations and are not excluded under the aforementioned Directive; b) an institution for occupational retirement provision within the meaning of Art.2 of Directive (EU) 2016/23416.

<sup>2</sup> If an asset manager invests on behalf of a institutional investor, regardless of whether with discretionary discretion under an individual client mandate or under an undertaking for collective investment, (...)