

Julius Bär

MEDIA RELEASE

Bank Julius Baer & Co. Ltd.

Julius Baer launches award-winning digital advisory platform in Asia

Julius Baer has implemented its state-of-the-art digital advisory platform – Digital Advisory Suite (DiAS) – in Asia. DiAS has received global accolades for outstanding technology innovation. Designed to represent the cutting edge of fintech, DiAS stands out for offering tailored advisory solutions for clients. With the automation of advisory process and investment idea generation, Julius Baer enables its advisors to improve the quality and quantity of client interactions.

Hong Kong/Singapore, 15 April 2021 – Amid the gathering pace of digitalisation in the financial industry, Julius Baer has stepped up efforts to create the pioneering solution DiAS. Now available in Asia, Julius Baer’s second home market, DiAS simplifies the complexity of regulations for relationship managers, empowering them to offer compliant advice confidently and competently.

The suite acts as a fully integrated solution, ensuring a seamless end-to-end advisory process, providing relationship managers with a holistic overview of client situations and identifying opportunities for engagement. DiAS was designed to boost efficiency by navigating regulations, automating administration and saving time in delivering investment advice. It screens Julius Baer’s investment universe and recommends investment ideas that meet clients’ investment objectives and risk appetite levels. It goes beyond previous systems by blending machine learning algorithms with the precise requirements of relationship managers, bringing Julius Baer to the forefront of digitalisation.

Nicolas de Skowronski, Co-Head of Investment & Wealth Management Solutions, Bank Julius Baer commented: “At Julius Baer, we believe that it is paramount to leverage technology to innovate and constantly enhance our services. Julius Baer is one of very few international private banks to have all their major booking centres on one digital advisory platform. To achieve such significant efficiency gains while still keeping the platform connected to our vast technology architecture, we needed a bespoke solution such as DiAS which was created from scratch by our teams across Zurich and Asia.”

Jimmy Lee, Head Asia Pacific, Bank Julius Baer said: “In light of changing market conditions and the evolving needs of clients in Asia, it is increasingly imperative for the financial industry to accelerate innovation and digital transformation. Integrated digital advisory platforms such as DiAS will empower relationship managers to manage portfolios efficiently and serve our clients in the region with best-in-class advice and customised solutions. Julius Baer will continue to invest significantly in technology to help relationship managers strengthen personal connections with clients.”

For more information regarding the launch of DiAS in Asia, please visit: [Listen up, Asia! A new FinTech assistant has entered the market \(juliusbaer.com\)](#)

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About Julius Baer

Julius Baer is the leading Swiss wealth management group and a premium brand in this global sector, with a focus on servicing and advising sophisticated private clients. At the end of 2020, assets under management amounted to CHF 434 billion. Bank Julius Baer & Co. Ltd., the renowned Swiss private bank with origins dating back to 1890, is the principal operating company of Julius Baer Group Ltd., whose shares are listed on the SIX Swiss Exchange (ticker symbol: BAER) and are included in the Swiss Leader Index (SLI), comprising the 30 largest and most liquid Swiss stocks.

Julius Baer is present in over 20 countries and more than 50 locations. Headquartered in Zurich, we have offices in key locations including Dubai, Frankfurt, Geneva, Hong Kong, London, Luxembourg, Mexico City, Milan, Monaco, Montevideo, Moscow, Mumbai, São Paulo, Singapore and Tokyo. Our client-centric approach, our objective advice based on the Julius Baer open product platform, our solid financial base and our entrepreneurial management culture make us the international reference in wealth management.

For more information visit our website at www.juliusbaer.com