



Looking After You
& Your Investment



INTRODUCING AQUILLA NUMMUS

Meet An Asset Management Firm That Puts Your Interests First

We're Aquilla Nummus Ltd, a boutique asset management firm that looks after the assets and investments of high net worth individuals – just like you.

Formed by a team of passionate investment professionals in 2017, Aquilla Nummus was set up to provide a highly personalised service to investors by tailoring traditional investment strategies to meet the individual needs of our clients.

Local Expertise, Global Exposure

What sets us apart from other asset management companies is, while we have global perspective when it comes investments and wealth creation, we are equally aware of the need to provide a personalised service that is tailored to the unique needs of our private clients.

Which is why, before we advise on the best investment opportunities, we'll take the time to get to know you first, in order to develop an investment portfolio that meets all your personal aspirations, as well as your financial circumstances and goals.

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In the world of business, the people who are most successful are those who are doing what they love.

- Warren Buffet

OUR MISSION

Investment Experts Working For You

At Aquilla Nummus, we understand what makes a great asset management firm: Trust, Transparency, Flexibility and Experience.

We'll always keep you in the know when it comes to the latest investment products and services and how your investment is doing so you can make informed decisions. Our team will explain everything in simple terms, demystifying asset management, so you can get on with doing what you do, while we make sure your portfolio is well looked after.

Meet the Team

Every one of the talented people at Aquilla Nummus has one goal in mind – safeguarding your assets and achieving the maximum returns for your investment. Each of our senior managers has a proven track

record of performance within their niche and, once we get to know you and your investment goals, we'll put together the best team necessary to drive optimal results on your investment.

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An investment in knowledge pays the best interest.

- Benjamin Franklin



A Focus On Services That Deliver

While at its most basic, the term 'asset management' refers to the act of safeguarding the assets of an individual or institution, in reality, it's much more than that. Every investor wants their assets to succeed over time, returns and increasing in value.

Which is exactly what we do for our clients at Aquilla Nummus. We do that by customising the services we offer into a package that provides the best financial solution for our clients:

Main Services

- Portfolio Management, including bond, equities and money markets.
- Safekeeping and administration of financial documents
- Custody of assets
- Brokerage services
- Market research and analysis

By combining our skills in all of these areas, the experts at Aquilla Nummus are able to deliver the best financial outcome for your assets and investments.



Never depend on a single income, make an investment to create a second source.

- Warren Buffet

The Secret To Investing: Diversification

The foundations of any investment strategy are based on risk. That level of risk will depend greatly on the individual investor. While your account manager will clearly explain the level of risk involved with every investment product and strategy, it's important for

investors to understand that the key to successful investing is diversification. By diversifying your funds across a range of markets, sectors and investment tools, you maximise returns, limit risk and protect your capital.

A Portfolio Designed for You

Typically, at Aquilla Nummus, we utilise three broad portfolio strategies, which we then customise based on client profile and need:



Conservative Portfolios
Low risk



Balanced Portfolios
Medium risk



Growth Portfolios
High risk

As the names suggest, these are developed based on the client's attitude to risk. While high risk portfolios have the potential to secure higher returns, they can also experience losses. However, even within each of these categories, we will always try to create a diversified portfolio that favours upside potential.



OUR SERVICE

Where it's all About You

At Aquilla Nummus, everything we do is focussed on you. From providing the best service to creating a successful portfolio, we understand it's vitally important that we get to know our clients.

Which is why we won't do anything until we know what you're all about, including your investment goals and attitude to risk, offering sound and informed financial advice that helps you make the best financial decisions as your needs change over time.

Delivering Consistent Great Service

We believe in proactive management and will continually review your portfolio and needs in order to deliver the best service and results. Here we like to keep bureaucracy to a minimum and are always completely upfront and transparent on fees.

And, of course, if you need any advice, your circumstances changes, or you're interested in a new investments product, one of our representatives is just a call away to give you the help you need.

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Finding the best person or the best organization to invest your money is one of the most important financial decisions you'll ever make.

- Bill gross



LIQUID INVESTMENTS

Giving You The Tools For Financial Success

Liquid investments are the most basic type of asset. To be considered 'liquid', they must be easily converted to cash. Which means there has to be a readymade market with good availability of interested buyers. While physical currency is the only truly liquid asset, bonds, equities and funds are good examples of assets that can be liquidated quickly at face value.

Cash When You Need it

Liquid assets are an important part of any asset management strategy, as you never know when a situation might arise that means you will require quick access to funds whether due to a personal emergency or to take advantage of a timely investment

The level of liquid assets in your portfolio will depend on your monthly financials and personal circumstances, so it's important to talk through this in detail with your financial adviser at Aquilla Nummus.

BESPOKE PORTFOLIOS

Crafting a Winning Portfolio

Every client is unique with a different set of needs, which is why it's important to build a portfolio of asset types that matches those needs, both now and in the long term. At Aquilla Nummus, we have a long track record in creating and managing individual portfolios that precisely meet your need for the short term, as well as the long term.

Delivering Results for You Now and For the Future

As an individual investor, we understand your portfolio must contain the optimum mix of investment products and needs to be reviewed regularly in order to continue to meet your investment needs, risk tolerance and capital requirements. To achieve this,

we will appoint a personal account manager to advise on investment mix and policy, so you secure the best balance of assets for your objectives and your portfolio delivers expected results throughout your time with us.



UNDERSTANDING ASSET MANAGEMENT

What Do You Want to Achieve?

Before creating any investment strategy for you, it's important that we know what your financial goals are. That's why it's so important that we have an in-depth meeting with you first to understand your objectives. With that information we are able to develop a full plan and timelines that meets your needs whether that's all about protecting your asset, generating an income or safeguarding your financial future.

Securing Your Future

After that, we're able to give you an investment policy statement. This is a detailed plan of how your money will be managed and invested in order to deliver all your financial goals right up to retirement. An advisor will be able to help you with all these aspects of financial planning.

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Know what you own, and know why you own it

- Peter Lynch





RISK PROFILE

What Sort of Investor Are You?

While reviewing your financial situation and evaluating your financial goals will be critical to creating the best portfolio, attitude to risk is personal thing and fundamental to achievement of your financial goals. Typically, when investing, there is a direct correlation between return and risk and how this is balanced will be critical to the success of your portfolio.

Getting to Know You Better

While, ultimately, how much risk you are prepared to take on is down to you, once our team understands where you are in life, your investment knowledge, goals, timelines, liquidity needs and expectations, we can advise on a number of options and investment strategies. This means you can make a well-informed decisions in order to help us determine asset allocation.

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Risk comes from not knowing what you are doing.

- Warren Buffet

UNDERSTANDING ASSET MANAGEMENT

Creating the Best Investment Package for Your Needs

Who you are will have a huge impact on the best investment portfolio for your needs. Once we've made a full assessment of your circumstances, needs and objectives, your portfolio manager will be able to advise on the best investment vehicles for your needs. This is known as asset allocation - a strategy which involves selecting the best investments within each class to develop the optimal portfolio targeting the gains that you seek, while also taking into account risk tolerance and the length of time you wish to invest.

Getting the Right Balance

There is no simply formula for asset allocation. Success here really comes down to the knowledge and experience of your investment manager – which is why, at Aquilla Nummus, we only recruit the investment professionals with a solid track record in delivering results within their specialist niches.



UNDERSTANDING ASSET MANAGEMENT

Keeping You in-the-know...

Our work doesn't end once your portfolio is in place. We will continue review your portfolio and individual investments to make sure your money is delivering the returns you seek. And, throughout, we will keep updated with news and advice so you can make well-informed decisions to balance risk with performance and drive even greater returns from your investment.

...Because Investing is for Life

Whether you're looking to buy a new home, putting children through college, or nearing retirement, we understand that your personal circumstance, priorities and needs change throughout life, so we'll be in touch to make sure your portfolio is still meeting

your current needs. Of course, the economic climate can change during the duration of your investment, so should we feel this may affect your portfolio, we'll let you know and advise you on the best options going forward.



SECURITY

You're Safe with Aquilla Nummus

At Aquilla Nummus, we never forget it's your money. That's why we'll take every precaution to make sure it's safe. We only work with the most reputable European

banks and financial institutions and always comply with financial and statutory regulations within the countries where we operate.

Looking After Your Money

Our risk controls and due diligence are world class and there to make sure your assets are protected at all times. We only partner with the world's most reputable custodians to protect your assets.

That's why, when you invest with Aquilla Nummus, you invest with complete confidence and peace of mind.



YOUR FINANCES AT A TOUCH

With Aquilla Nummus, You Know Where You Stand

We are committed to transparency, so we've designed our service and online portal to make sure you have round-the-clock access to your investments and financial position, so you know can clearly see how your investment is performing. And, we'll make you're made aware immediately of any factors that might affect the success of your portfolio, such as corporate actions, plans by third parties, market movements or economic factors.

Information When You Need it

Furthermore, we're happy to customise our statement and reporting service to meet your individual needs, so you have the information you need, when you need it, to plan your financial future.

Of course, if you have any personal concerns, we're contactable whenever you need us. If we can't solve your query there and then, we aim to get back to you within 24 hours on all queries.

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The secret to investing is to figure out the value of something – then pay less for it

- Joel Greenblatt

INVESTING WITH AQUILLA NUMMUS

Why You Should Choose Aquilla Nummus

When you invest with Aquilla Nummus, you have real peace of mind that we're looking after your interests. Not only do you have a team of experienced investment professionals looking after your interests, but we will always customise our service to provide the best possible solutions to all your needs.



Exceptional Customer Service

We are here for you when you need us and will go the extra mile to make sure the service we offer meets your financial objectives and lifestyle needs.



Customised Investment Solutions

Aquilla Nummus has access to the widest range of investment options, so you get more choice and the best possible portfolio for your needs.



Flexible, Transparent Fee Structure

We pride ourselves in being transparent in every aspect of our services – especially when it comes to fees.



Advice and Investment Insights

Managing your wealth can be complex and time-consuming. That's why we're here to do it for you. Beyond that, we will proactively manage your portfolio, advising you along the way with jargonless advice you need to grow your investments and protect your assets.



Investment Professionals

With Aquilla Nummus, you get access to a team of proven investment professionals with niche-specific experience that makes sure you get world class advice and expertise.

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Invest in something today that your future self will thank you for.

Visit aquillanummus.io to find out more why we are the best asset investment firm for your money. You can use the contact form there to get in touch or email info@aquillanummus.io to let us know what we can do for you and we will reach out at a time convenient to you.



aquila nummus

Tel: +35796231519 Fax: +35796231519

26 Lordou Vyronos 1096 Nicosia, Cyprus

www.aquillanummus.io