



DESIGN BOOK

Your Brand Identity, Reflected in Every Slide.

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Our Mission

We support you from the initial brief to final delivery, producing on-brand documents that align with your objectives and land with impact.



Our team supports you, whether:



You are already an UpSlide customer and wish to launch a design project.



You are interested in UpSlide to improve productivity and consistency.

Our Finance Expertise

01

Finance Design Specialists

By focusing only on finance services, we understand your workflows and challenges and can tailor our approach accordingly.



02

Microsoft 365 Expertise

All work is conducted within PowerPoint, Excel, Word, and Power BI, so your materials are ready the moment we hand them back.



03

Optimal Use

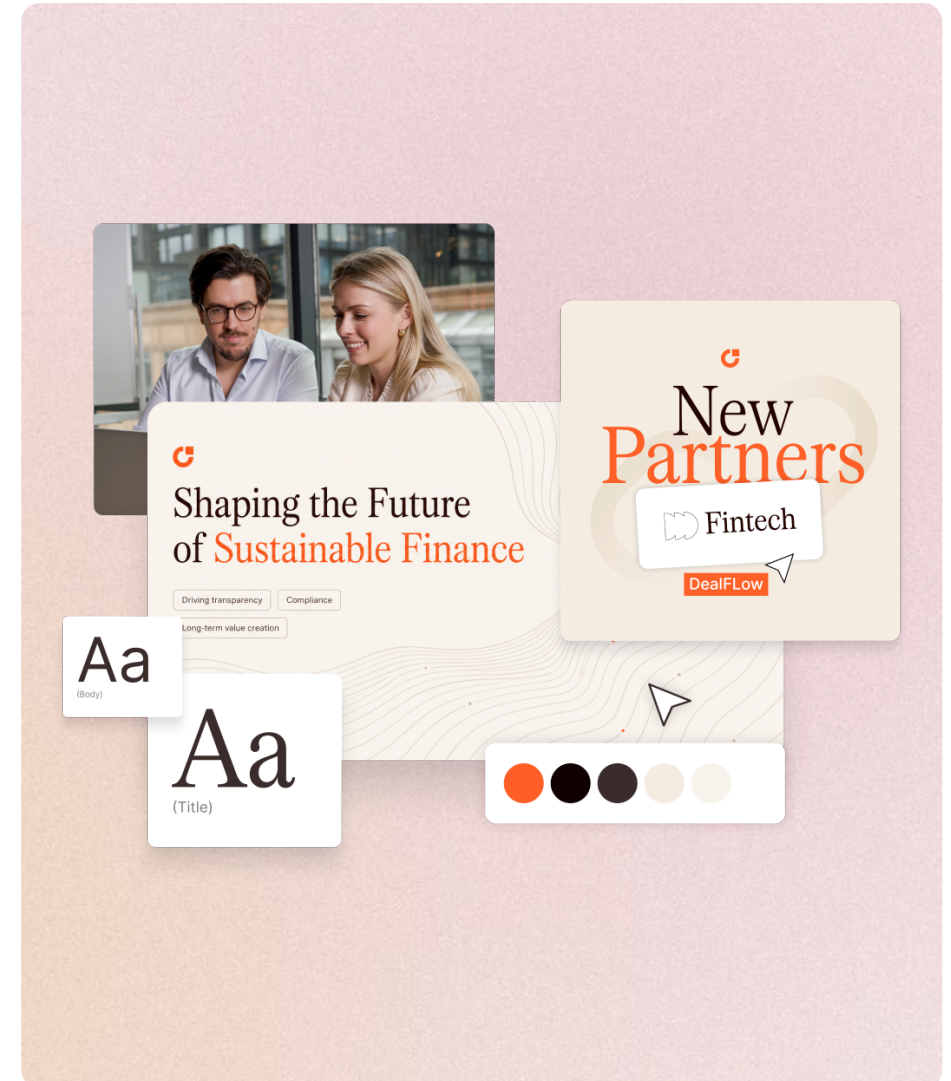
Whatever the project, each design can be used daily in Microsoft 365, then edited and reused just as easily.



04

Close Collaboration

We support your consultant at every stage to help ensure your project succeeds.



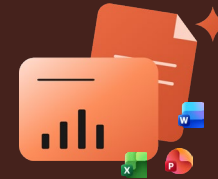
Our Offer

Support and Advice



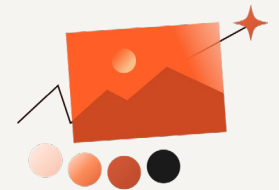
- Audit of your design
- Tailored advice (template compatibility, rebranding, sustainable design for printing)
- Artistic direction
- Design training

Office-Based Design



- PowerPoint templates and slides
- Word templates and pages
- Excel styles
- Documents for publication (newsletters, brochures)

Asset Creation



- Brand guidelines
- Videos (motion design)
- Visuals for websites
- Illustrations
- LinkedIn posts and banners
- Roll-up banners

Projects



We work exclusively with financial teams:

Asset Management

Advisory

Corporate

Banking



Asset Management



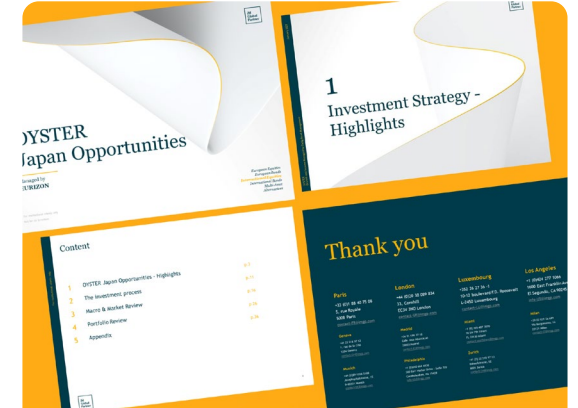
ABN AMRO
Investment Solutions



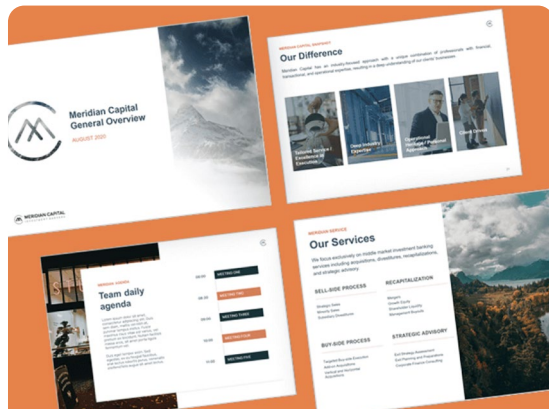
Tikehau Capital



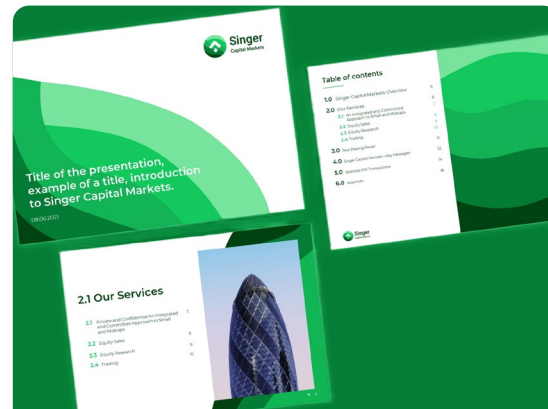
Groupama
Asset Management



iM Global Partner



Meridian Capital
Investment Bankers



Singer Capital Markets



Zencap
Asset Management

ABN AMRO

Investment Solutions

PowerPoint Template

“

We are very satisfied with our collaboration: **smooth communication and a friendly team who fully met our expectations.**

We worked with UpSlide **to adapt our new Group brand guidelines to our materials** - from marketing templates to banners, including key slides about our teams, investment processes, and distribution areas. Their expertise was also valuable in harmonizing the design of our regulatory and sustainability reports.



Photo
©Camille Collin

Aude Josset

Head of Marketing & Com.
Asset Management

Marketing Communication
For professional investors only - Not for public distribution

ABN AMRO Parnassus US Sustainable Equities lorem ipsum lorem ipsum lorem

ESG Investment Product (under SFDR)

25th June 2024

Please refer to the prospectus of the fund and to the KID before making any final investment decisions.
Further information on the sustainability approach of AMI is available on [www.abnamro.com/par/sfdr](#)

For French investors: By reading this presentation, you agree that you understand all the information provided. As a reminder, all regulatory documents are available on the management company's website in French.

ABN-AMRO
Investment Solutions

Exclusive delegation to:

3 Section title name

ABN-AMRO
Investment Solutions

Agenda

- Name of the first section 5
- Name of the second section 6
- Name of the third and much longer section to perform a two-line test and how to place the text 9
- Name of the second, slightly longer section 12
- Name of the fifth section of the presentation 16
- Name of the sixth section 22
- Name of the seventh section of the presentation
- Name of the slightly longer eighth section

ABN AMRO Parnassus US ESG Equities Fund

Portfolio characteristics

Nb of holdings	Active Share	Weighted Avg. Market Cap (Bn)	P/B (12M trailing)	P/B (1-12M)	ROE (1-year)	Debt/Equity (1-year)
39	71.1%	643,102.8	25.50	4.24	27.85	0.44

Market capitalization

■ Mega cap (≥100B\$)
■ Liquidity 1%

Sector breakdown

Information Technology 23.4%
Financial 1.0%
Industrials 1.0%
Communication Services 1.0%
Materials 1.0%
Health Care 1.0%
Consumer Staples 1.0%
Consumer Discretionary 1.0%
Real Estate 1.0%
Utilities 1.0%
Energy 1.0%

Source: ABN AMRO Investment Solutions as of April 30, 2024. Fund holdings, market capitalization and sector breakdown are not intended to represent future portfolio composition. Fund holdings are subject to change and should not be considered a recommendation to buy or sell any securities. Percent of Total Net Assets is calculated by dividing the market value of each security by the value of the fund's assets minus liabilities. There is no assurance that the sector breakdown of the account's portfolio will remain at the time you receive this document. This presented sector breakdown is not intended to represent future sector portfolio breakdown. All investments involve risk, including the risk of losing principal. Relative sector weights are the results of stock selection decisions, not the result of sector bets. Past performance is no indicator of future returns.

ABN AMRO Parnassus US ESG Equities Fund | 29

Thank you for your attention.

Paris
119-121 Bd Haussmann,
75008 Paris,
France

Amsterdam
Gustav Mahlerlaan 10,
1092 PP Amsterdam,
The Netherlands

Frankfurt
Mainzer Landstraße 1,
60324 Frankfurt am Main,
Germany

www.abnamroinvestmentolutions.com
ask.contact@f.abnamro.com

ABN-AMRO
Investment Solutions

ABN AMRO Investment Solutions

PowerPoint Content Slides

Comprehensive stewardship activities

ESG Stewardship Strategy

- Impact engagements
- Proxy voting
- Industry associations and initiatives
- Stewardship reporting

Company Engagement

Proxy Voting

Industry Collaboration

Parnassus Investments encourages positive change in companies held in portfolios through ESG stewardship efforts including:

- Impact engagements
- Proxy voting
- Industry associations and initiatives
- Stewardship reporting

ABN AMRO Investment Solutions has the voting responsibility on ABN AMRO Parnassus US ESG Equities.

It may occur some discussions with Parnassus Investments on voting issues.

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

20

Investment Philosophy

- Good businesses at attractive valuations**
 - Increasingly relevant products or services
 - Clear and sustainable competitive advantages
 - Quality management with appropriate incentives
 - Positive ESG (environmental, social and governance) factors
 - Attractive three-year range of outcomes
- Fundamental research**
 - Bottom-up research
 - Collaborative team-oriented process
 - Well-defined and repeatable process

"We are seeking to compound wealth in a responsible way for our investors."
Todd C. Ahlsten, CIO

Source: Parnassus Investments. The philosophy presented above reflects the investment philosophy of Parnassus Investments.

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

10

ABN AMRO Investment Solutions

A range of exclusivities with best-in-class investment teams

Asset class	Strategies	SRI classification of the investment fund			Style	
		AIK	AIK	AIK	Value	Smart
European Equities	EdenTree European Sustainable Equities					
	United European Sustainable Equities					
US Equities	Parnassus US ESG Equities					
	Botan Common US Sustainable Equities					
Global & Impact Equities	United Global Impact Equities					
	Sachs Emerging Market Equities					
Fixed Income	Simbion Emerging Market Impact Debt					

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

4

Quality assessment of company attributes

Fundamental Attributes

To assess business quality, the investment team considers the future relevancy of the company's products or services, its moat and its management and sustainable business practices in the context of its sector.

Screened universe

Relevancy	Management	Moat	Sustainable Practices
- Disruptive technology - Current penetration - Secular trends - Substitution	- Capital allocation - Incentives - Board structure - Integrity	- Switching costs - Network - Regulation - Low-cost provider - Patents - Brand	- Material - Reputational - Macro level

Source: Parnassus Investments. The process presented above reflects the investment process of Parnassus Investments.

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

13

Main Characteristics (2/2)

Countries Registrations

ABN AMRO Parnassus US ESG Equities Fund

29

ABN AMRO Parnassus US ESG Equities

Portfolio Managers

Benjamin Allen
Chief Executive Officer, Portfolio Manager
MBA, University of California, Berkeley & AB, Georgetown University
Industry tenure: 25 years
Parnassus tenure: 15 years
Manager tenure: 12 years

Todd Ahlsten
Chief Investment Officer, Portfolio Manager
BS, University of California, Berkeley
Industry tenure: 29 years
Parnassus tenure: 25 years
Manager tenure: 25 years

Andrew Choi
Portfolio Manager and Senior Analyst
MBA, Harvard Business School & MS, Princeton University
Industry tenure: 7 years
Parnassus tenure: 5 years
Manager tenure: 5 years

Benchmark

- MSCI USA NR (USD)

Key Attributes

- Primarily large cap
- High conviction, high active share and low turnover
- Focus on full market cycle returns
- Asymmetry of upside and downside capture

> 19 years average tenure

Andrew Choi was named a portfolio manager of the Core Equity Strategy as of January 3, 2022. The team is equally divided between two quarters between the current portfolio of the fund throughout the life of the portfolio.

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

8

Using ESG analysis to improve high-quality stock selection

ESG materiality and reputational risks are interconnected, as strong management of material risk often results in a positive reputation, and vice versa

- Material Risk**
Significant events or risks that may affect the financial performance and success of a company, typically over a three-year time frame
- Reputational Risk**
Significant likelihood of a company's public perception being impacted by its management of ESG topics

A clear, repeatable process

- Fundamental analysis and portfolio managers lead the ESG risk assessment process
- ESG stewardship team contributes both initial and ongoing expertise

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

15

Engaging with companies leads to better business and societal outcomes

Impact engagements
In-depth engagements initiated by the ESG stewardship team that may involve using multiple holdings to act on important ESG issues, such as climate change

- Identify topics**
 - Potential for measurable impact
 - Materiality for stock
 - Importance for investors
 - Significance for companies
 - Leadership opportunity
- Develop engagement strategy**
 - Identify issues
 - Set measurable goals
 - May leverage industry network
- Prescribe remedy**
 - Initial engagement
 - Communicate desired outcome
- Follow up and report**
 - Publish results
 - Annual Shareholder Report

Companies engagements
Focused engagements with companies in each strategy led by the investment team

- Identify risk issues**
 - Business controversy
 - Material risk
 - Reputational risk
- Approach company**
 - Formal and informal conversations
- Solicit remedy**
 - Consult, but don't dictate
- Follow up and report**
 - ESG company profiles
 - Annual Shareholder Report

ABN AMRO Parnassus US Sustainable Equities team (team name) (team name)

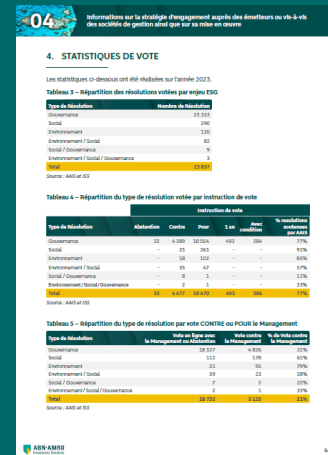
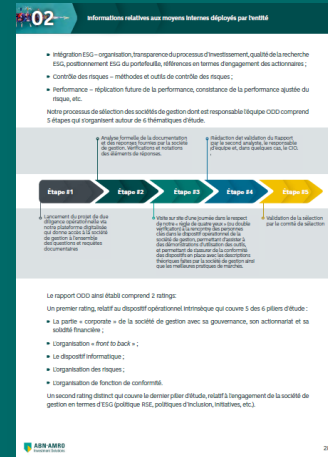
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ABN AMRO Investment Solutions

ESG Report (InDesign & Word)

Sommaire

- 01 Informations relatives à la démarche générale de l'entité P.4
- 02 Informations relatives aux moyens internes déployés par l'entité P.19
- 03 Informations relatives à la démarche de prise en compte des critères ESG au niveau de la gouvernance de l'entité P.35
- 04 Informations sur la stratégie d'engagement auprès des émetteurs de titres et des sociétés de gestion ainsi que sur sa mise en œuvre P.41
- 05 Informations relatives à la taxonomie européenne et aux considérations fiscales P.47
- 06 Informations sur la stratégie d'alignement avec les objectifs internationaux de limitation du réchauffement climatique définies par l'Accord de Paris P.52
- 07 Informations sur la stratégie d'alignement avec les objectifs de long terme liés à la biodiversité P.56
- 08 Informations sur les démarches de prise en compte des critères environnementaux, sociaux, et de qualité de gouvernance dans la gestion des risques P.61
- 09 Démarches d'ambulation et mesures correctives P.81





Rapport Loi Énergie Climat 2024

Revue sur l'année d'exercice 2023

ABN-AMRO
Investment Solutions

Rapport au titre de l'article 29 de la loi sur l'énergie et le climat (LEC), décret d'application n°2921-663 publié le 27 mai 2021.

See more

ABN AMRO Investment Solutions

2026 Greeting Card



Email Signature Banner



LinkedIn Banner



Stand



Roll-up Banners



Tikehau Capital - 2017

PowerPoint Template

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After working with an agency to redesign its logo, the company sought a corresponding visual identity and graphic charter.

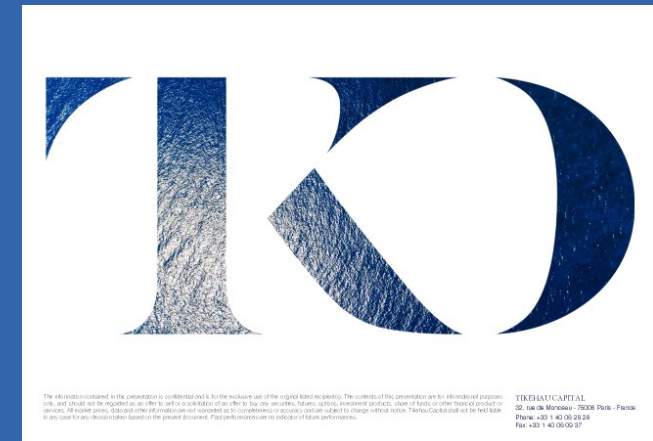
The artistic direction team used the logo's typography as the central graphic element, combined with visuals suggestive of travel in order to set Tikehau apart from its competitors.

Lastly, this identity was applied to various documents that can be reused.



Amélie Pantaleone

Design Team Lead
UpSlide



Tikehau Capital - 2017

PowerPoint Content Slides

A PAN-EUROPEAN DIVERSIFIED ASSET MANAGEMENT AND INVESTMENT FIRM

Founded in **2004**

€ 11.1 bn⁽¹⁾ of AuM

€ 2.3 bn⁽¹⁾ of shareholders' equity, invested in the strategies of the firm

c.175 employees and partners

Established track record in Private and Public markets

Pioneer & leader in alternative financing for SMEs in Europe

TKO LISTED Euronext

Global presence
Paris, London, Brussels, Madrid, Milan, Seoul, Singapore

⁽¹⁾ as of 30/06/2017
⁽²⁾ as of 30/06/2017, pro forma of the July 2017 rights issue

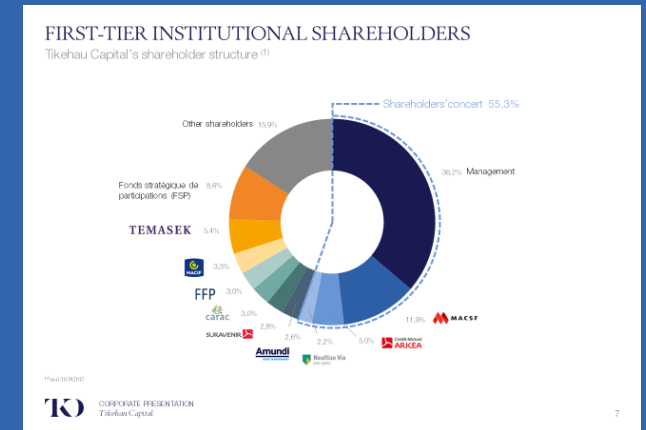
TKO CORPORATE PRESENTATION
Tikehau Capital

CONTACTS

Paris 32, rue de Monceau 75008 Paris FRANCE Phone: +33 1 40 06 26 26	London 111, Old Broad Street London EC2N 1AP UK Phone: +44 203 821 1030	Brussels IT Tower, Avenue Louise 490 1050 Brussels BELGIUM Phone: +32 2894 0090	Madrid Calle de Velazquez 96 28 009 Madrid SPAIN Phone: +34 91 048 2770	Milan Piazza del Carmine 4 20121 Milan ITALY Phone: +39 02 6063 1500
Seoul 43FL Three FIC 10 Gukjeong-ro, Yeongdeungpo-gu Seoul, 07326 SOUTH KOREA Phone: +82 2 6138 4331	Singapore 12, Marina View #23-06 Asia Square Tower 2 Singapore 018961 SINGAPORE Phone: +65 6718 2111			

City
Address
COUNTRY
Phone: +XXX XXXX XXXX

TKO CORPORATE PRESENTATION
Tikehau Capital



WHAT SETS US APART

1 Fully aligned interests

- Management controls indirectly 36.2%⁽¹⁾ of the capital
- Tikehau Capital is a core investor in every strategy launched by the Group

2 Second to none team

- Emphasis on best in class research, investment process & risk management
- Highly skilled team with average experience of 10 years in the finance industry

5 Worldwide sourcing

- Best-in-class network of investment partners with international reach
- Strong team of top senior advisors
- Cross-sourcing between business lines

4 Network of blue chip investors and partners

- Our shareholders are ALSO investors in our strategies

3 Strong balance sheet

- Significant cash position allows to:
 - Invest across strategies
 - Develop co-investments
 - Provide flexibility and seize growth opportunities

TEMASEK FFP Amundi MACYS ARKEA

⁽¹⁾ as of 30/06/2017

TKO CORPORATE PRESENTATION
Tikehau Capital

Tikehau Capital - 2017

Sales Brochure



TIKEHAU CAPITAL

Founded in 2004 | €1.5bn IPO in March 2017 | €12.6bn of AuM | €2.3bn of shareholders' equity | c.185 employees

What sets us apart

- 1 Fully aligned interests**
Management controls indirectly 38.2% of the capital. Tikehau Capital is a core investor in every strategy launched by the Group.
- 2 Second to none team**
Emphasis on best in class research, investment process & risk management. Highly skilled team with average experience of 21 years in the finance industry.
- 3 Strong balance sheet**
Significant cash position allows to:
 - Invest across strategies
 - Develop co-investments
 - Provide flexibility and seize growth opportunities
 - Diversify our investments portfolio
- 4 Network of blue chip investors and partners**
Our shareholders are also investors in our strategies.
- 5 Proven track record in external growth**
Key acquisitions supporting company's growth:
 - 2012 acquisition of *Sagepax*
 - 2016 acquisition of *Lycor UK's* European Senior Debt Operations
 - 2016 acquisition of *IRET Global*
- 6 Worldwide sourcing**
Best in class network of investment partners with international reach. Strong team of top senior advisors. Cross-sourcing between business lines.

Tikehau Capital - Our expertise ⁽¹⁾

LIQUID STRATEGIES €2.0bn	We operate a conviction-based strategy rather than merely try to 'beat the benchmark'. We want to be convinced by what we invest in. Based on the work of our award winning in-house research team and a fundamental macro and bottom-up approach.	PRIVATE EQUITY €2.3bn	We target private companies with high growth potential and help them deploy their ambition. By providing patient capital and operational support to the companies we invest in, we make a transformative impact and create value.
PRIVATE DEBT €5.5bn ⁽¹⁾	We're a leading European pioneer in alternative financing. Our private debt teams are able to structure, finance and participate in financing deals with a focus on SMEs.	REAL ESTATE €1.5bn	We invest primarily in European commercial real estate with a focus on non-core products to achieve higher return through active asset management. We are able to acquire large portfolios with multiple assets.

⁽¹⁾Source: Tikehau Capital as at 30.09.2017 ⁽²⁾As at 30.09.2017, pro forma of the July 2017 rights issue ⁽³⁾including €1.2bn of AuM from the CLO activity

FOCUS : OUR PRIVATE DEBT EXPERTISE

A Leading Private Debt Pioneer

Direct lending has emerged as an attractive alternative for companies looking to expand, develop or make acquisitions.

Investment Universe

(Target Companies)
 € 50m - € 1bn
 Enterprise value
 € 7/8m - € 80m
 EBITDA
 All sectors in Europe
 Sectors & geographies
 € 10m - € 300m
 Investment size

(Target Portfolio)
 Stretched senior debt
 3-4x Leverage
 Unitranche
 3-6x Leverage
 Mezzanine / PIK debt
 4-7x Leverage

Having pioneered private debt in France and beyond, Tikehau Capital private debt teams are among the most experienced in Europe. With 25+ professionals, we can structure, finance, participate in and implement a variety of financing deals, from €10 - 300 million, particularly in senior debt, stretched senior, unitranche financing, mezzanine debt and distressed equity. This also includes securitization vehicles dedicated to CLO professionals team originating, a specialized product consisting of obligations backed by a portfolio of leveraged loans.

Tikehau Capital can implement fast, flexible and reliable funding for medium sized companies looking to make acquisitions or develop their activities.

Through its subsidiary Credit II, Tikehau Capital enables its wide network of investors and partners to broaden their investment policy, currently focused on medium-sized and larger companies, to include smaller businesses vigorously selected by Credit II teams.

Tikehau is a specialist alternative asset management and investment company. We are proudly independent. And we relish the freedom that gives us. We are confident in our expertise – so when we do make bold choices, we're equally confident they're the right ones. We believe in original, critical thinking. In avoiding herd behaviour. And we show our conviction by investing alongside our stakeholders, putting trust and mutual interest at the heart of our business.

In barely a decade our approach has helped us grow into one of Europe's leading alternative investment firms. We live in a world of follow my leader. Our aim is to offer a more free thinking alternative.

Antoine Flammarion and Mathieu Chabran – Co-founders of Tikehau Capital

PRIVATE DEBT

Synergetic Private Debt Platform ⁽¹⁾

Corporate Direct Lending French SMEs ⁽²⁾ AUM : € 0.6bn 4 - 6% IRR Direct lending to French SMEs NOW & IN NOW	Leveraged Loans AUM : €3.2bn ⁽³⁾ Euribor + 3.5 - 5.5% European Senior leveraged loans Mostly heavily syndicated	Direct Lending AUM : €1.7bn Euribor + 6 - 13% Stretched senior - Unitranche Mezzanine - PIK loans
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A Leading and Recognized Franchise

Widely Recognized Team

- Private Debt Lender of the Year (2016)
- Private Debt Lender of the Year (2015)
- Unitranche Lender of the Year – Europe (2014)
- Private Debt Lender of the Year (2014)
- Entrepreneurial Investment Firm of the Year (2013)
- Nominated as Lender of the Year – Europe (2013)

Leading Market Share in Deal Activity ⁽⁴⁾

⁽¹⁾Data as of 30.09.2017 ⁽²⁾Excludes all CDO / sponsor other transactions ⁽³⁾Including €1.2bn of AuM from the CLO activity

Cécile Mayer-Levi
FONDEUSE
clem@tikehaucapital.com
phone : +33 1 53 00 06 92 / +44 (0) 203 821 1000

Jean-Baptiste Faut
FONDEUR
jbaut@tikehaucapital.com
phone : +33 1 53 00 07 09

www.tikehaucapital.com
Paris, London, Brussels, Madrid, Milan, Seoul, Singapore

TIKEHAU CAPITAL 32, rue de Monceau 75008 Paris
Phone : +33 1 40 06 26 26 - Fax : +33 1 40 06 09 37
477 588 104 RCS Paris

Groupama AM

PowerPoint Template

“

Very high level of professional skills and excellent working relationship - in a word, an outstanding collaboration.

Deadlines were met, design directions were relevant, and the needs were well understood.



Madeleine Peragut
Communication Director
Groupama Asset Management

Titre de la présentation sur trois lignes lorem ipsum dolor sit

Sous-titre de la présentation sur quatre lignes lorem ipsum dolor sit amet nunc est armorem sigur vicem

Décembre 2024

Notes/Disclaimer : Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.

Sommaire

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2	Notre gamme Performance Absolue	p.5	6	Caractéristiques commerciales et risques	p.13
3	Processus d'investissement de l'expertise Performance Absolue	p.7	7	Processus d'investissement de l'expertise Performance Absolue	p.15
4	Groupama AM Alpha Fixed Income : performances et positionnement	p.8	8	Annexes	p.17

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Groupama

Décembre 2024

1

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Sous-titre de la section lorem ipsum

Groupama

Décembre 2024

Siège social :
25, rue de la Ville l'Évêque
75008 Paris
Tel.: 01.44.56.76.76

Société de gestion de portefeuille
Agrément GP23-02 du 05/01/03
Société Anonyme au capital de 1 878 910 euros
389 522 152 RCS Paris
Siret 389 522 152 00 047 - APE 6630Z

www.groupama-am.com

Groupama

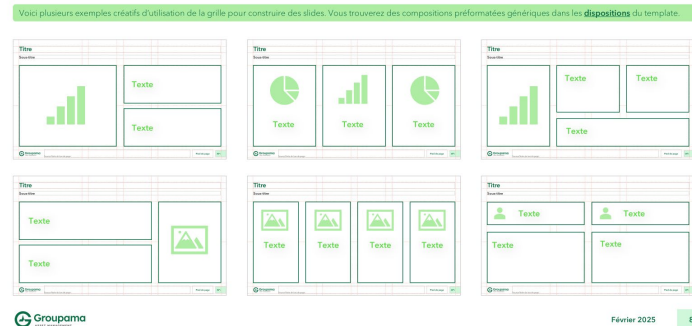
Groupama AM

PowerPoint Brand Book

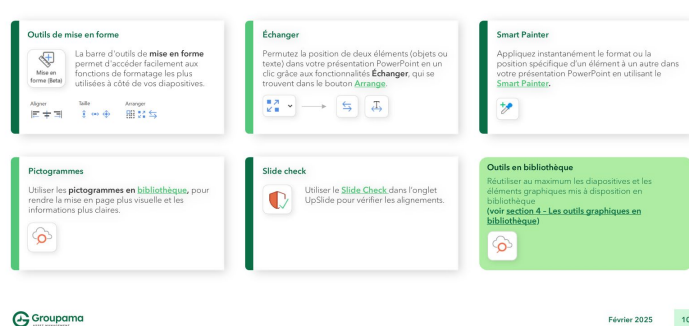
A detailed guide for optimal use of the template and content library.



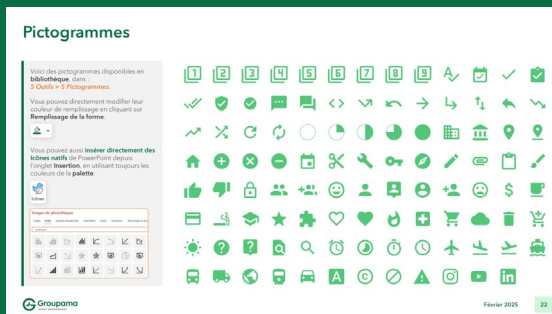
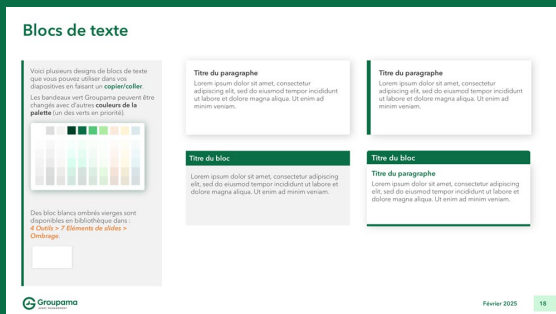
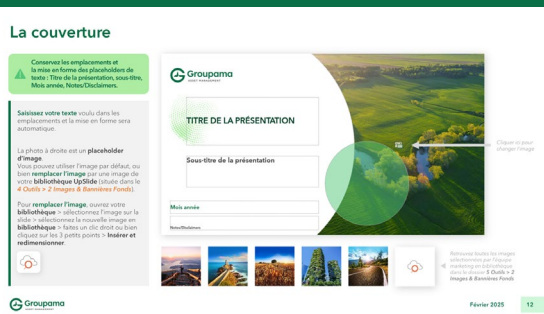
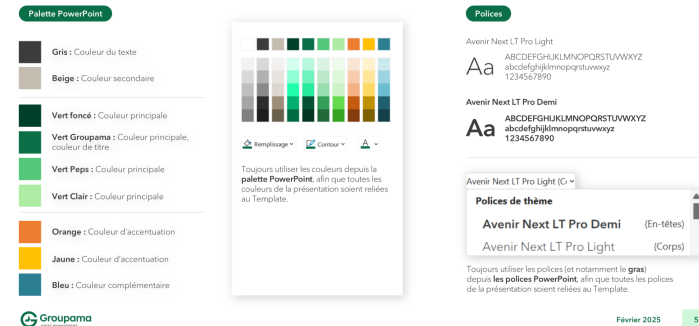
Exemples de mise en page / compositions



Faire des diapositives impactantes - 6 outils dans le ruban UpSlide



Couleurs et police de caractère



iM Global Partner

“

We thoroughly enjoyed working with Amélie to push forward iM Global Partner's corporate identity.

She provided a creative response to our needs along with recommendations in terms of graphic creation and the organization of our rebranding effort.



Gwen Gautier

Marketing Director
iM Global Partner

PowerPoint Template



April 2022

For professional investors only

M&P
 Global Partner Worldwide Asset Management Bureau

Sub-brand logo placeholder

Partner logo placeholder

M
 Global
 Partner

Strong In-depth Research & Due Diligence Capabilities

A high standard process to identify best-in-class investment teams

An experienced team with proven track record of selecting undiscovered outstanding investment managers.

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Hundreds of due diligence saepe eveniet ut et voluptates 2001 to 2022.

27

Executive Management team



Philippe Couvrecelle
CEO & Founder

32 years of experience in Asset Management, including 10 years as Chairman of the Executive Board at Edmond de Rothschild AM (EDRAM) and Deputy Chief Executive Officer at Natixis Asset Management in charge of Business Development.



Philippe Uzan
Deputy CEO
Head of International Distribution

25 years of experience in Asset Management. Jean spent over 17 years at Pioneer Investments, where he was one of the leading distribution executives with roles in Asia Pacific, LatAm, US offshore and Iberia.



Philippe Uzan
Deputy CEO
Head of International Distribution

25 years of experience in Asset Management. Jean spent over 17 years at Pioneer Investments, where he was one of the leading distribution executives with roles in Asia Pacific, LatAm, US offshore and Iberia.



Jeffrey Sealey
Deputy CEO
US Chief Operating Officer

28 years of experience in Asset Management. Jeff spent over 15 years building AMF Funds with his last four years as Head of US Distribution and Executive Committee member.



Jean Maunoury
Deputy CEO
US Investor Relationship

30 years of experience in Asset Management. Jean has supported IM Global Partner since its launch in 2013. From 2007 to 2013, Jean conducted numerous business due diligences at EDRAM and Natixis while managing asset allocation funds of funds.



Jean Maunoury
Deputy CEO
US Investor Relationship

30 years of experience in Asset Management. Jean has supported IM Global Partner since its launch in 2013. From 2007 to 2013, Jean conducted numerous business due diligences at EDRAM and Natixis while managing asset allocation funds of funds.



20

iM Global Partner

Various Word Templates

Manager profile



ZADIG

Asset Management



Zadig Asset Management

A top performing European equities manager

2013

FOUNDED IN

5

EUROPEAN EQUITY STRATEGIES

€1.6bn

AUM AS OF APR-20

€692

MM IN THE MEMNON EUROPEAN EQUITY UNITS

€692

MM IN THE MEMNON EUROPEAN EQUITY UNITS

The firm

Founded in 2005 in London (United Kingdom), Zadig Asset Management is a European equities specialist, owned and employee controlled with operational offices in Luxembourg. The firm was founded by Laurent Saglio, a serial entrepreneur in the asset management industry who previously launched and successfully co-managed the Voltaire fund from 1998 to 2005. It is registered with the Luxembourg CSSF.

The Strategies

The firm manages a suite of four European equities strategies, all sharing the same unique and pragmatic investment philosophy developed by Laurent in the mid-nineties : European Equities (flagship launched in 2011), Market Neutral (launched in 2016 on the basis of Laurent's and partner Vincent Bourgeois' prior strategies) and the most recent ones, Sustainable Europe and Europe Growth and Income. The strategies all benefit from the strong and proprietary risk management approach of the firm, which utilize highly efficient tools providing deep and transparent factor analysis.

• The flagship strategy, that is also be implemented in Oyster Europe, is managed by Laurent Saglio and Vincent Bourgeois, who joined in 2011 and brings +20 years of investment experience. It uses the high conviction, fundamental and style neutral approach developed by Laurent over his 30+ year experience; the fund is composed of roughly 25 mid to large capitalization companies, essentially from continental Europe, picked among the best ideas of the team.

• The other European equities strategies are based on the same fundamental and focused philosophy, but are implemented with different investment objectives and investment universes:

• the Market Neutral Strategy, a European equity market neutral strategy with minimal or no European equity market correlation, which long portfolio is essentially composed of the stocks of the European equities flagship and which short portfolio is composed of a combination of equities and indexes, as was were Zadig and Voltaire funds.

• the Sustainable Europe Strategy, launched in March 2019, which is available as Oyster Sustainable Europe. The strategy puts even more emphasis to ESG factors than the other strategies managed by Zadig, which became signatory of UNPRI in 2016,

• the Europe Growth and Income, which aims at delivering a balance between steady income and long-term capital growth by investing in a combination of equities and corporate bonds.

The European equities strategies are served by a team of 6 very experienced portfolio managers / analysts, progressively assembled by Laurent over the years.

• Zadig also manages a global macro strategy, Memnon ARP, aiming at generating a high single digit return over the medium term se with little or no correlation to equities and government bonds. This strategy combines directional and style premia strategies to get exposure to performance streams from equity indices, government bonds, commodities and credit.

Manager profile

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September 2020



Peer Comparison Analysis

Research & Investment

[Publish Date]

[Title]

[SubTitle]

Contents

1. Title 1

1. Title 1

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[Title] - [SubTitle]

For professional clients only

1



Peer Comparison Analysis

[Publish Date]

Disclaimer

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[Title] - [SubTitle]

[Date of publication]

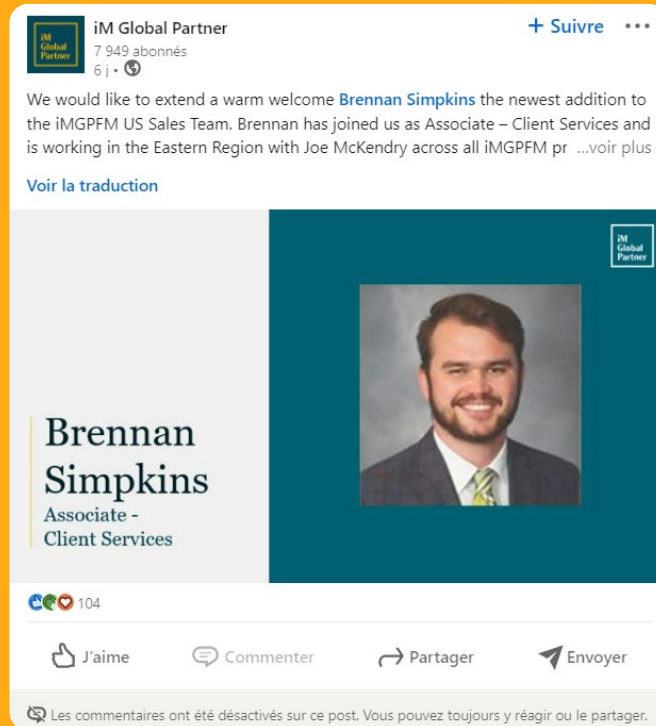
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3

21

iM Global Partner

LinkedIn Post Template



Email Signature



Printed Advertisement for US Finance Magazine



iM Global Partner

Manager Profile PowerPoint Template

Access a singular asset management network

Paris - London - Luxembourg - Los Angeles

US products available to US domiciled investors

Equities

US Equities

Polen Capital US Focused Growth SMA & Mutual Fund
Polen Capital Small Cap Growth SMA & Mutual Fund
Scharf Investments Equity SMA & Mutual Fund

International Equities

Polen Capital Global Growth Mutual Fund
Polen Capital International Growth Mutual Fund
Polen Capital International Small Cap Growth Fund
Scharf Global Opportunities Mutual Fund

Multi-Asset

Scharf Investments Multi Asset Strategy SMA
Scharf Multi Asset Mutual Fund

Bonds

US Bonds

IM Dolan McEniry Corporate Bond Mutual Fund
Dolan McEniry Core Plus SMA
Dolan McEniry Investment Grade SMA
Dolan McEniry High Yield SMA
Dolan McEniry Credit SMA
Dolan McEniry Short Duration SMA

Alternatives

IM DBI Hedge Strategy ETF
IM DBI Managed Futures Strategy ETF
Scharf Alpha Opportunity Mutual Fund
Sirios Capital Long Short Equity Mutual Fund

A focus on developing innovative solutions and putting **clients first**.

Our solutions: mutual funds, separately managed accounts, UCITS funds and ETFs.

FOR INSTITUTIONAL INVESTORS ONLY - NOT FOR GENERAL DISTRIBUTION.

January 2021 5

When only the best will do

- We seek to generate sustainable alpha for our clients through a diversified multi-boutique model that combines entrepreneurial spirit and diversity of investment talent.
- We acquire long term minority participations. In asset managers, our Partners, they are independent and preserve the unique culture that have made them successful.
- We benefit from over 15 years of in-depth research on more than 300 asset management firms to select outstanding asset managers.
- We provide high quality, active investment strategies and first class services for institutional and individual investors.

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January 2021 6

Developing a top-notch investment network

Acting as one-stop-shop covering key asset classes

Long-term minority stakes are taken in some of the best independent, traditional, active and alternative managers

IM Global Partner concentrates on managers invested in longstanding assets, featuring good margins, and which have proven resilient in adverse market conditions.

Our Partners are aligned with our own philosophy which favors in-depth research, early identification of promising opportunities and investing for the long-term.

Our Partners provide a high-quality suite of products, including different asset classes, investment approaches, processes or horizons.

Our Partners are entrepreneurial, mid-sized investment firms, independently owned, providing complementary solutions for clients.

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January 2021 7

Thank you

Paris	London	Luxembourg	Los Angeles
+33 (0)1 48 47 75 08 5, rue Royale 75008 Paris contact@imglobal.com	+44 (0)20 38 889 834 25, Cannon EC2W 3AG London contact@imglobal.com	+352 26 27 36 1 18-19 Boulevard F.D. Ruescheweg L-2456 Luxembourg contact@imglobal.com	+1 (949) 277 1066 1460 East Franklin Avenue Suite 10 El Segundo, CA 90245 info.us@imglobal.com
Geneva	Madrid	Munich	Milan
+41 (0)22 318 91 12 1, rue de la Cluse 1204 Geneva info.ch@imglobal.com	+34 (91) 76 17 00 Paseo de Recoletos, 5, P. 1004 Madrid info.es@imglobal.com	+49 (0)89 487 8970 38-39-40 Street 81529 Mannheim info.de@imglobal.com	+39 (0)2 825 94 000 Via Borgomano, 14 20121 Milano info.it@imglobal.com
Amsterdam	Philadelphia	Toronto	
+31 (0)20 688 1100 Janszwyldijk 100 1022 AS Amsterdam contact@imglobal.com	+1 (800) 468 4820 300 Bank Street Suite 200 Camden, NJ 07902 info.us@imglobal.com	+1 (416) 593 88 88 300 Bloor Street West Toronto, ON M5W 1A5 contact@imglobal.com	

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iM Global Partner

Website

See more

Meridian Capital LLC

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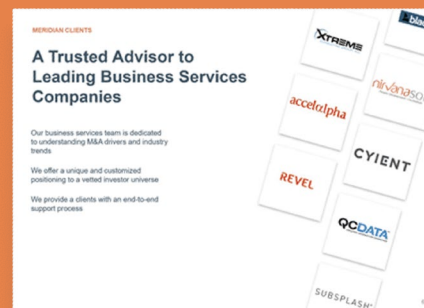
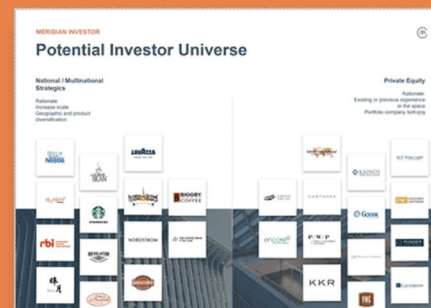
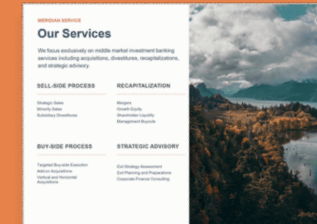
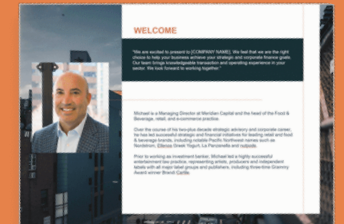
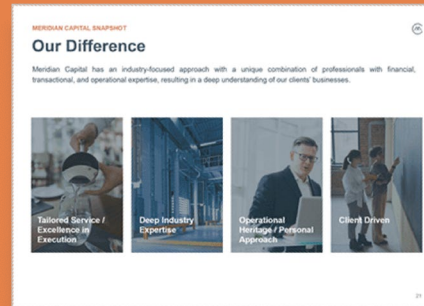
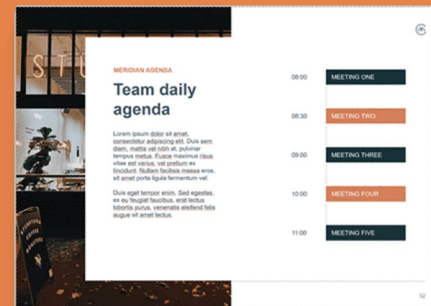
The Meridian Capital LLC marketing team turned to an agency to redesign its logo.

It then sought out our Design team to apply this logo to its various materials via new brand guidelines.



Amélie Pantaleone
Design Team Lead
UpSlide

PowerPoint Content Slides



Meridian Capital LLC

PowerPoint Templates in Portrait Format



FALL 2021 | CONSUMER UPDATE

Vista Outdoor (NYSE:VSTO) Acquires Foresight Sports

Announced September 10th, 2021

- In Q2 2021, Vista Outdoor announced its acquisition of Foresight Sports. Vista owns a broad collection of well-established consumer brands across outdoor and shooting sports including Camelbak, Camp Chef, Bushnell, Bell, Giro, Blackhawk, Federal, and Redding.
- Foresight Sports is an award-winning, San Diego-based manufacturer of technology-centric golf analytics, data collection, and performance products including swing monitors, simulators, smart club carts, and more.
- The acquisition significantly strengthens VSTO's presence and market leadership in the growing golf technology market, bringing Foresight and Bushnell Golf (range finders) together.
- Transaction value was \$474 million with up to \$20 million in additional contingent proceeds based on performance targets.

Testimonials

“Lorem ipsum dolor sit amet, consectetur adipiscing elit. Nulla ut lectus eros. Nulla aliquet eros sit amet efficitur ultrices. Quisque vulputate hendrerit eros non placerat. Nullam id vestibulum sem, ac tincidunt arcu. Quisque vestibulum ornare mi, sit amet varius massa scelerisque eu. Curabitur vel lacina mi.”

MICHAEL BARBER
Managing Director
mbarber@meridianllc.com

Source: PitchBook Data, Company Press Releases, and Meridian Research

FALL 2021 | CONSUMER UPDATE

Outdoor Industry Suffers Slowdown in Q3 2021

Significant supply chain constraints have plagued many businesses around the world throughout 2021 and continue to impact stock price growth for publicly-traded companies. These constraints are expected to throttle growth as the outdoor industry continues to see robust demand.

U.S. Outdoor and Active Lifestyle M&A Activity

Indoor activities 46% **Outdoor activities 54%**

No outdoor activities
14% of new outdoor recreation participants say they don't want to continue their outdoor activities

Online
40% of these participants said they are spending more time online

Spurred by the COVID-19 pandemic, 2020 and 2021 brought record levels of outdoor recreation participation as travel and indoor restrictions pushed consumers outside to find new hobbies.

Everyone is Going Outside... But Will They Stay?...

M&A activity in the sector followed a similar trajectory with a flurry of activity early in the pandemic, subsequently returning to more normalized levels in 2021.

Subsector valuations have seen major separation since Q2 2020. Clothing, footwear, and outdoor gear EBITDA multiples climbed from pre-pandemic highs below 15x to nearly 50x in Q2 2021 before returning to slightly above 15x in Q3 2021. Wheel and watersports companies on the other hand saw enormous multiple growth in Q3-Q4 2020 but have since dropped below pre-pandemic levels in Q3 2021.

Source: PitchBook Data, Company Press Releases, and Meridian Research

FALL 2021 | CONSUMER UPDATE

U.S. Outdoor and Active Lifestyle M&A Activity

Number of Announced Transactions

Quarter	Q4 2019	Q1 2020	Q2 2020	Q3 2020	Q4 2020	Q1 2021	Q2 2021	Q3 2021
Outdoor Recreation	440	493	620	384	485	475	473	386
Active Lifestyle	153	173	176	246	110	197	167	131

Significant supply chain constraints have plagued many businesses around the world throughout 2021 and continue to impact stock price growth for publicly-traded companies. These constraints are expected to throttle growth as the outdoor industry continues to see robust demand.

Public Market Valuations (EV/EBITDA)

Company	Market Cap	Revenue	EBITDA	EV/EBITDA	Enterprise Value	EV/Revenue
Target Outdoor Co. LLC	2,380	2,081	107	14x	2,380	1.5x
Target Outdoor Co. LLC	86	248	148	10x	86	0.7x
Target Outdoor Co. LLC	176	486	48	10x	176	1.2x

From the 2022 Company Press Releases, and Meridian Research

34% Lorem ipsum dolor sit amet, consectetur adipiscing elit

Source: PitchBook Data, Company Press Releases, and Meridian Research

CONSUMER PRODUCTS PRACTICE OVERVIEW

Meridian Capital Sector Coverage

- Wholesale and Distribution
- Retail
- E-commerce
- Personal Care
- Juvenile
- Specialty
- Wellness
- Nutrition
- Outdoor and Active Lifestyle
- Housewares
- Apparel

Meridian Capital Transaction Experience

Barbar Industries Acquired by: LFM Capital	Taylor Industries Acquired by: THEOREY	Jacob Ball Acquired by: JAVEG	La Maroon Acquired by: Le Maroon	Classic Homecare Acquired by: CLASSIC HOME CARE
Emerson Global Acquired by: EXPOSE	Exposed Systems Acquired by: EXPOSE	CR Worldwide Acquired by: CR Worldwide	Old World Acquired by: Old World	Green Taps Acquired by: Green Taps
Handi-Quilter Acquired by: Handi-Quilter	Elanco Acquired by: Elanco	Chief's Corporation Acquired by: Chief's Corporation	Pacific Dental Acquired by: Pacific Dental	Art Cobell Acquired by: Art Cobell
Stanley Acquired by: Stanley	Handi-Quilter Acquired by: Handi-Quilter	Chief's Corporation Acquired by: Chief's Corporation	Pacific Dental Acquired by: Pacific Dental	Art Cobell Acquired by: Art Cobell

Includes transactions completed by Meridian partners other at previous firms

MERIDIAN CAPITAL INVESTMENT BANKERS

Helping middle market business owners with their M&A and corporate finance goals since 1995.

Meridian Capital's Consumer Products Team

MICHAEL BARBER Managing Director mbarber@meridianllc.com	CHUCK WILKE Founder and Managing Director cwilke@meridianllc.com	GIOVANNA BURNS Senior Vice President gburns@meridianllc.com	BENTON STURT Vice President bsturt@meridianllc.com	NATHAN MILLER Associate nmiller@meridianllc.com
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Transaction Expertise
Mergers & Acquisitions
Growth Capital
Strategic Advisory

Tailored Processes
High-Touch Approach
Multidisciplinary Deal Team
End-to-End Services

Meridian Capital has been helping middle market business owners their M&A and corporate finance goals since 1995.

A Seattle-based M&A advisory firm, which has served as a trusted advisor to business owners on complex corporate finance, M&A, and strategic challenges for over 20 years. The firm differentiates itself through its deep industry insights, highly customized service approach, and end-to-end commitment to execution.

Contact Us

1809 Seventh Avenue
Suite 1330
Seattle, WA 98101

t: (206) 623-4000
e: info@meridianllc.com
meridianllc.com

Singer

Capital Markets

“

In 2021, N+1 Singer merged with another management company to become Singer Capital Markets.

We were tasked with **creating a corporate identity that would reflect the brand's heritage** by adding a modern twist while retaining its culture and values.



Amélie Pantaleone

Design Team Lead
UpSlide

Logo



+

=



Singer
Capital Markets



Singer Capital Markets

Word Template



PowerPoint Template



Singer

Capital Markets

PowerPoint Content Slides

Corporate Advisory

Principal Services

Buy-side & Sell-side Advisory

Deal Structuring & Execution

Acquisition Searches & Strategic Reviews

Dual Track Capabilities for Private Clients

16 M&A transactions since 2018

£3 billion Total deal size in the last 2 years

No. 1 Financial Adviser by Volume, 2019

WYG plc: Singer Capital Markets acted as Rule 3 Adviser & Broker to WYG on their Acquisition by Tetra Tech UK Holdings Limited for £43.4 million; a **premium of approximately 244%**

Selected M&A Transactions

Placeholder tombstone

Private and Confidential

Here put the name of the section reminder

5

Trading: Driving Liquidity Through our Trading Platform

#1 or #2 market share by volume in over 100 companies

#1 market share in £2 of our corporate broker and joint brokerages

Strong experience of joint brokerages with 42 appointments

% Change in Daily Average Volumes Since Appointment

New clients have benefited directly from our appointment, experiencing on average a 395% gain in the average daily volume of shares traded.

What do institutional investors want?

Strong / experienced management team

- Key consideration, with top-in to a management team's strategic vision core to investor valuation
- Particularly important in a turnaround story, execution regarding extraction of value from core B.

Attractive addressable market

- Early-stage market with high-growth potential
- Barriers to entry
- Market fragmentation with weak competition

Differentiated Services / Product

- Positioning within the Group's target sector is key
- Strength of proposition vs. peers - leader or disruptor?

Quality of customer base

- Blue-chip customer base gives validation to Group platform and products
- High credit quality offering more security over investment

Solid company performance track record

- Past performance discounted into future expectations
- "Trend is friend"

2.1 Our Services

2.1 Private and Confidential
An Integrated and Committed Approach to Small and Midcaps

7

2.2 Equity Sales

8

2.3 Equity Research

9

2.4 Trading

10

Singer Social Impact ('SSI')

Our goal at Singer is to contribute on all fronts to society. We are a business with a great team of active 'givers' both with our time and money. However, we have now reached a certain scale where we can start contributing more and, hopefully, with greater impact. We strongly believe that helping and changing our world should be tackled collegially with both actions and investment, which forms the basis of our initiatives.

Diversity & Inclusion (D&I)

A commitment to ensuring **every person at Singer has the chance to perform brilliantly** and be remunerated accordingly

Green Energy & Sustainability

A commitment to reducing waste, **being more eco-friendly** as an office and a strong focus in supporting businesses in sustainable industries

Social Impact Fund

A commitment to **improving the impact to our local community**, including the introduction of our 'Singer Social Impact Fund'.

Work/Life Balance

A commitment to ensuring our staff have a **good and sustainable work/life balance**. We measure by output, not input

Private and Confidential

Here put the name of the section reminder

13

Singer Capital Markets

Brand Book

1.6 Our promise to our stakeholders

We are driven by:

- The trust we build**
We care about our clients and their data point. You can trust our advice and our management. You can trust our program management.
- The care we provide**
We care about our clients and their data point. We care about our investment decisions. We care about our business and financial performance.
- The results we deliver**
We will deliver consistent, superior results. We will deliver superior returns on your investments.

1.8 Our ambition: To be the best in the UK small cap market

- #1** We must be best about our ambitions.
- #2** We must be focused and clear on what we stand for - capital raising experts and financial providers.
- #3** We must be differentiated by our strengths and the promises we make to our stakeholders.
- #4** We must be determined to reach our goal of becoming the best in our market.

1.7 What makes us unique

We are dynamic
We adapt our approach to fit the needs and preferred working styles of all our clients - not one size fits all.

We are ambitious
We challenge our clients to strive for ambition. We are calculated risk-takers, who consistently look for more.

We are approachable
We build trusted relationships and friendships with our clients which allows for a transparent working approach.

We are achievers
We are proud to strive for the upmost success and deliver focussed results for our clients - your success is our success clients.

1.4 Our recognised areas of strength

- Heritage Brand**
With a proven track record of delivering for our clients.
- Well established**
The capital markets and financial services.
- Our people**
Our people are what truly differentiates us from the rest.
- Profitable**
With a proven track record of delivering for our clients.

01. BRANDING OUTLINE

1.1 Our genesis

Singer Capital Markets was founded in 2006 with the sole aim of servicing the UK small cap market and becoming the best small cap investment bank in the UK. It's been a fascinating time, and we've shaped our core strategy of being the best small cap investment bank in the UK. We set up Singer Capital Markets because we wanted to create a great business and most importantly, one that was driven by the needs of our clients. There are many things that make us a successful business, but our most important asset is our people. We have a team of experts who are passionate about their work and who are committed to delivering the best results for our clients. We have a strong track record of delivering for our clients, and we are proud to be the best small cap investment bank in the UK. We are a team of experts who are passionate about their work and who are committed to delivering the best results for our clients. We have a strong track record of delivering for our clients, and we are proud to be the best small cap investment bank in the UK.

80% of our employees are female in our business.

22 are Equity Partners holding over 50%.

1.9 How our brand is presented

- Modern**
Our business is reflective of recent trends, trends, times, and beliefs - we are not stuck in old ways of thinking and doing.
- Energetic**
We work with great velocity - we have growth and we understand the value of growth in the workplace.
- Youthful**
We are passionate about our business - we care about our clients and our environment.
- Progressive**
We are advocates of social reform - we care about our clients and our environment.

1.3 Our heritage

- 2012** Singer Capital Markets is born from the merger of two companies.
- 2014** The company is rebranded to Singer Capital Markets.
- 2016** The company is rebranded to Singer Capital Markets.
- 2018** The company is rebranded to Singer Capital Markets.
- 2020** The company is rebranded to Singer Capital Markets.

1.4 Our people

Our people are our most important assets. At Singer we believe that everyone should have the chance to perform brilliantly and be remunerated accordingly. Diversity and success go hand in hand.

01 BRANDING OUTLINE

02 GRAPHIC GUIDELINES

03 SOCIAL IMPACT

1.10 Singer Social Impact

Our goal at Singer is to contribute on all fronts of society. We are a business with a great team of active givers, both with time and funding. However, we have more than a certain social impact as we start contributing to the community, we have a social impact. We are proud to be the best small cap investment bank in the UK. We are a team of experts who are passionate about their work and who are committed to delivering the best results for our clients. We have a strong track record of delivering for our clients, and we are proud to be the best small cap investment bank in the UK.

Green Energy & Sustainability
A commitment to reducing waste, being more eco-friendly as an office and a strong focus on supporting businesses in sustainable industries.

WorkLife Balance
A commitment to ensuring our staff have a good and sustainable worklife balance. We measure by output, not time.

Social Impact Fund
A commitment to improving the impact to our local community, including the introduction of our 'Singer Social Impact Fund'.

2.1 Logo versions

Singer Capital Markets

Singer Capital Markets

Singer Capital Markets

Singer Capital Markets

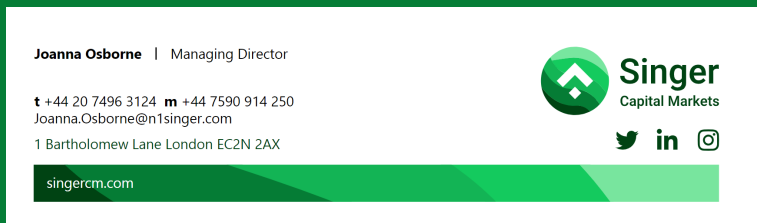
Head office
1 Bankers Quay, London EC2A 4DF
Main Reception: +44 (0)20 7496 3000
Compliance: +44 (0)20 7496 3000

Singer Capital Markets

Business Cards



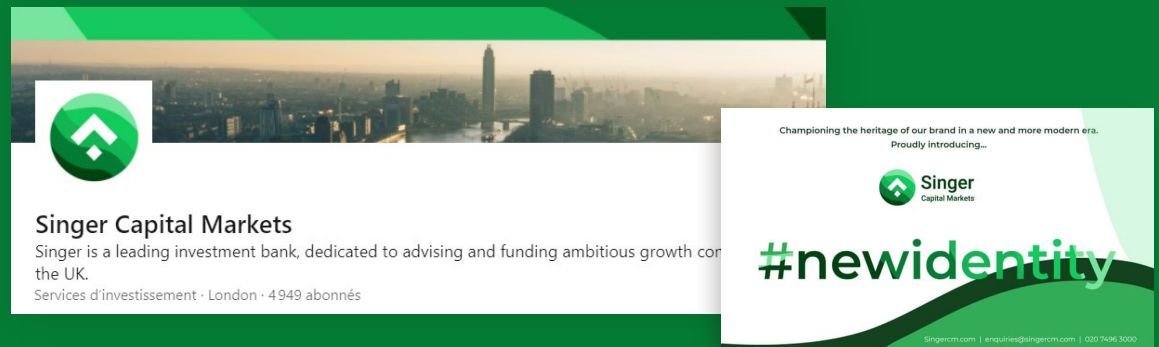
Email Signature



Intranet Page Template



LinkedIn Banner and Post Templates



Zencap

Asset Management

“

The UpSlide studio helps us on an ad hoc basis and with great efficiency, in a context coordinated with the software.



Victoire Blazsin

Deputy-CEO - Founding Partner

Zencap Asset Management

PowerPoint A4 Reporting Template

FPS ZENCAP REAL ESTATE DEBT III
Reporting trimestriel | 30 sept. 2022

Classification SFDR : 6 8 9

Stratégie d'investissement et objectif de Gestion

Lorem ipsum

Dolorsit

Amet-Nunc

Voluptat: XX%

Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi consequatur.

Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas.

Caractéristiques du fonds

Code Isin XXXXXXXXXXXXXXXXXXXXXXXX

Structure juridique FPS de droit français

Devise EUR

Date de création XXX/XX/XXXX

Date de fin XXX/XX/XXXX

Zone géographique Zone Euro (France principalement)

Frais de Gestion + Frais admin 0,XX% à 0,XX% + max 0,XX% admin.

Commission de performance XX% des flux TTC, si rendement net > X%

Phases de vie du fonds Période d'investissement : Fév. 2021 => Fév. 2024
Période de de réinvest. : Fév. 2024 => Fév. 2026

Label LuxFlag ESG

Chiffres clés au 30 sept. 2022

Actif net du fonds < XXXXm€

Engagement total XXXXm€

Montant total appelé XXXXm€

Nombres d'émetteurs X

CRD des investissements XX,0 M€ soit XX,XX% de l'engagement total

Montants additionnels engagés mais non tirés XX,0 M€ soit XX,XX% de l'engagement total

Coupon moyen brut X,XX%

Rendement cible moyen brut (hors défaut) XX %

Maturité moyenne résiduelle X,X ans

Sensibilité crédit X,XX

Exposition moyenne X,XX%

Taux fixe / Taux variable XXX% / X%

FPS ZENCAP REAL ESTATE DEBT III
Reporting trimestriel | 30 sept. 2022

Suivi du deal flow depuis mars 2021

Example Bridge

Commentaire de gestion

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

FPS ZENCAP REAL ESTATE DEBT III
Reporting trimestriel | 30 sept. 2022

Credit Watch-list

- Lorem ipsum
- Dolor sit amet.
- Consectetur adipiscing
- Elit sed do eiusmod
- Lorem ipsum
- Dolor sit amet.
- Consectetur adipiscing
- Elit sed do eiusmod

Zencap

Asset Management

PowerPoint Content Slides

Unitranche : un produit adapté aux stratégies ESG ambitieuses

Zencap AM a l'ambition affirmée de

- Duis aute iure dolor in reprehenderit in voluptate velit esse cillum laboris nisi ut aliquip ex ea commodo consequat
- Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit laboriosam, nisi ut aliquid ex ea commodi
- dolorem ipsum quia dolor sit amet, consectetur, adipisci velit on numquam eius modi tempora queraet voluptatem

Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur, vel illum qui dolorem eum fugiat quo voluptas nulla pariatur.

Zencap Asset Management 10

Solidité du segment small & mid cap

Solidité des financements small & mid cap ?

Forces internes

- Lorem ipsum dolor sit amet
- Consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore
- Ut enim ad minim veniam, quis nostrud exercitation voluptatem
- Inventore veritatis et quasi architecto beatae vitae dicta

Forces externes

- Nemo enim ipsam voluptatem quia voluptas sit aspernatur
- Consequatur magni dolores eos
- Neque porro quisquam est

Zencap Asset Management 6

Notre engagement ESG

Perspicatis unde omnis iste natus error sit voluptat **accusantium doloremque laudantium totam**

Neque porro quisquam est unc voluptare **incidunt ut labore et dolore**

Quis autem vel eum iure reprehenderit qui in ea voluptate velit esse quam nihil molestiae consequatur exercitationem **ullam corporis suscipit**

Nemo enim ipsam **voluptatem quia voluptas** sit aspernatur aut odit aut fugit, sed quia consequuntur magni dolores eos qui ratione voluptatem sequi nesciunt

Quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Ut enim ad minima veniam, quis nostrum exercitation.

Zencap Asset Management 16

L'opportunité offerte par le small & lower midcap

Accompagner des PME à certains stades cruciaux de leur développement

- Lorem ipsum dolor sit amet, consectetur adipiscing elit, eiusmod tempor
- Ut enim ad minim veniam, quis nostrud commodi exercitation
- Nemo enim ipsam voluptatem quia voluptas sit aspernatur aut odit aut fugit
- Ut enim ad minima veniam, quis nostrum exercitationem ullam corporis suscipit

Zencap Asset Management 9

L'heure du crédit

Closing Leverage Ratios

Ed quia non numquam eius modi tempora incidunt ut labore et dolore.

Source : Aster Financial Services - <https://asterfs.com/wp-content/uploads/2023/04/BECK-ATHER-Q1-2023.pdf>

Zencap Asset Management 11

Les ETI – PME françaises

Les emprunteurs visés constituent un marché dynamique

5 500 ETI en France

X millions d'emplois

XX% des exportations

XX% de la valeur ajoutée produite

153 000 PME en France

XM de salariés

X% de la valeur ajoutée

Les ETI & l'industrie

Les ETI représentent XX% des emplois industriels

XX% de leurs emplois sont des emplois industriels

Réindustrialisation

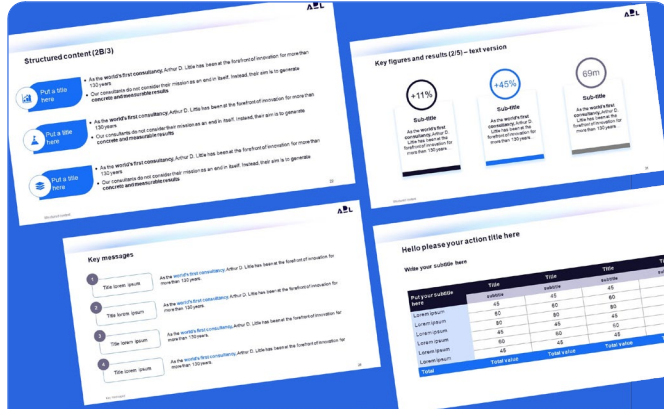
Les développements géopolitiques récents accélèrent les plans locaux de réindustrialisation, avec les PME et les ETI au premier plan

Croissance des ETI

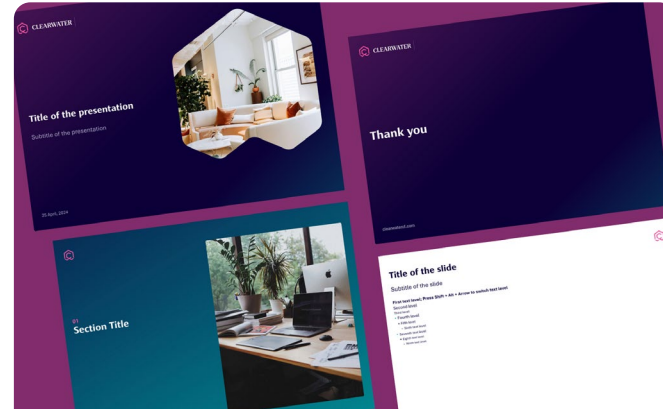
XX% des ETI ont connu une croissance de leur CA au T3 2022 vs T3 2021

Zencap Asset Management 5

Advisory



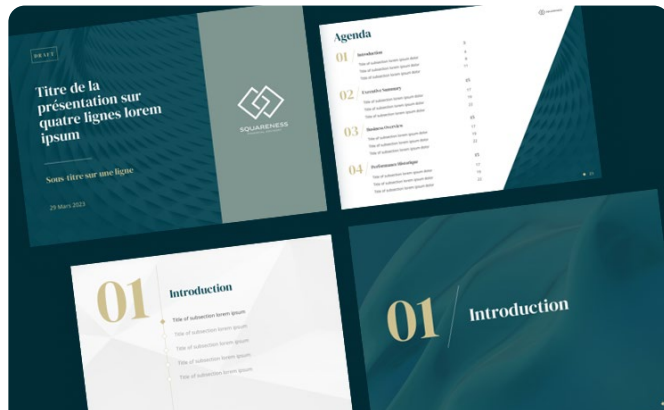
Arthur D. Little



Clearwater



Venturistic



Squaresness



FI Partners



NewCo Corporate Finance

Arthur D. Little

“

An agency was tasked with creating Arthur D. Little's visual identity along with a PowerPoint template, but the end result proved inappropriate for the activity of the company's consultants.

ADL thus turned to the UpSlide designers to rework the template, create reusable Model slides and establish Excel styles in line with their new guidelines.



Amélie Pantaleone
Design Team Lead
UpSlide

Model Slides

2. SLIDE LAYOUTS

Simple text slide – with bullet points, no subtitle Simple text slide Simple text slide

- As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years. Our consultants do not consider their mission as an end in itself.
- As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years. Our consultants do not consider their mission as an end in itself.
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Break-out option for key information
Pelentesque habitant morbi tristique senectus et netus et malesuada fames ac turpis egestas. Proin pharetra nonummy pede. Mauris et orci.

Source: Lorem ipsum dolor sit

Chart with comments (light)

World, 2015-2019, USD m

Series Series

Driver 1: lorem ipsum dolor lorem ipsum dolor lorem ipsum
Driver 2: lorem ipsum dolor lorem ipsum dolor lorem ipsum
Driver 3: lorem ipsum dolor lorem ipsum dolor lorem ipsum

Structured content (2B/3)

Put a title here

- As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.
- Our consultants do not consider their mission as an end in itself. Instead, their aim is to generate concrete and measurable results.

Put a title here

- As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.
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Put a title here

- As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.
- Our consultants do not consider their mission as an end in itself. Instead, their aim is to generate concrete and measurable results.

Structured content

Key figures and results (2/5) – text version

01 Sub-title
As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.

02 Sub-title
As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.

03 Sub-title
As the world's first consultancy, Arthur D. Little has been at the forefront of innovation for more than 130 years.

Structured content

Bio – 2 people

Consultant's name
Role: Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor

PROFILE
Consulting focus: Lorem ipsum dolor
Professional background: Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor
Education: Lorem ipsum dolor Lorem ipsum dolor Lorem ipsum dolor

EXAMPLES OF RELEVANT PROJECTS
Experience
Project lorem ipsum dolor
Project lorem ipsum dolor
Project lorem ipsum dolor
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Project lorem ipsum dolor
Project lorem ipsum dolor
Project lorem ipsum dolor
Project lorem ipsum dolor

Bio

Hello please your action title here

Write your subtitle here

Put your subtitle here	Title	Title	Title	Title
	subtitle	subtitle	subtitle	subtitle
Lorem ipsum	45	45	45	45
Lorem ipsum	60	60	60	60
Lorem ipsum	80	80	80	80
Lorem ipsum	45	45	45	45
Lorem ipsum	60	60	60	60
Total	Total value	Total value	Total value	Total value

8

Clearwater

“

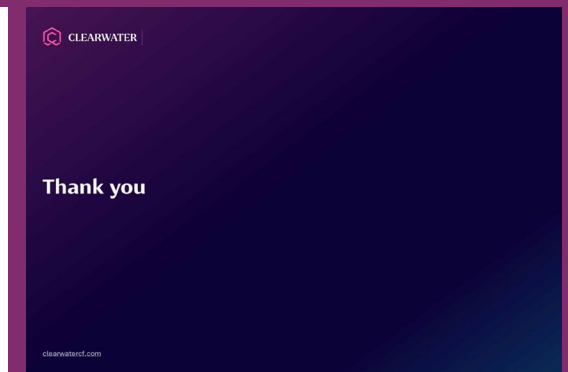
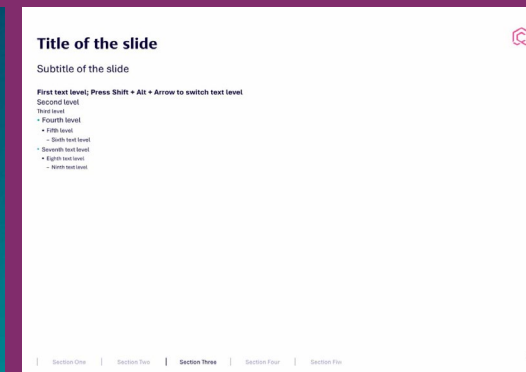
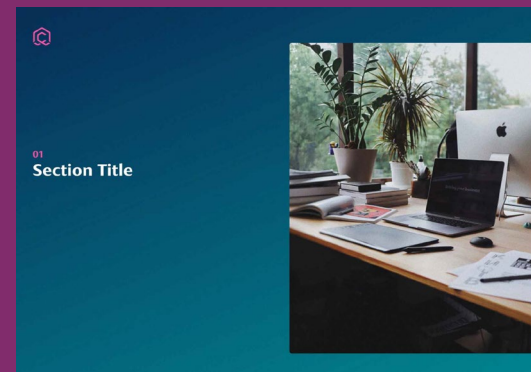
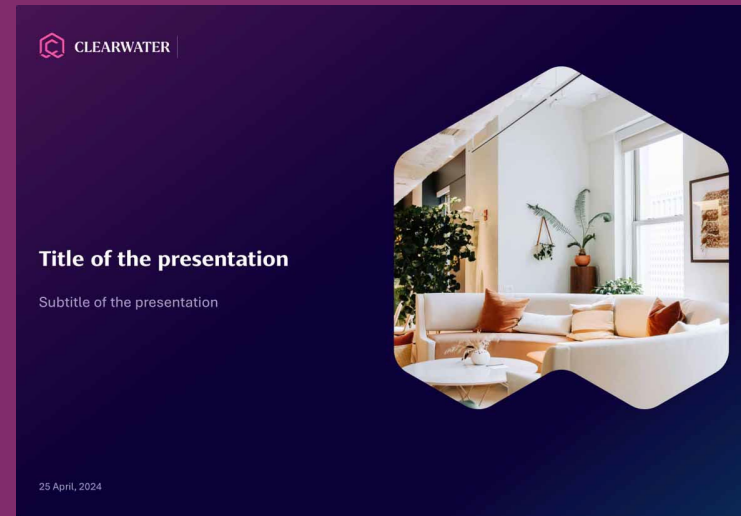
At quite short notice, Marianne and the team at UpSlide grasped a radical change in our brand identity and managed to bring it to life through our new PowerPoint template and UpSlide library.

Not only does our template need to look good, it has to work technically to drive working efficiencies, and that's not easy to achieve across 12 different countries that all have slightly different wants and needs. Credit to UpSlide for their patience and guidance throughout the rebranding process.



Kathryn Small
Head of Marketing
Clearwater

PowerPoint Template



Clearwater

PowerPoint Content Slides

Clearwater: Our Values

Adaptable

Our adaptability embodies our resilience and flexibility, empowering us to navigate change and thrive in the dynamic business landscape.

Personable

We are always genuine and approachable in our demeanour, unimpeded by the formalities of the traditional suit-and-tie, building meaningful and lasting relationships, with businesses throughout their lifecycle.

Committed

We show unwavering dedication to nurturing businesses, doing what should be done rather than what has been done before.

Clearwater: The most attractive home for business

19
Offices worldwide

+400
Employees

€Xm
Avg. transaction value

€Xbn
Total transaction value

+X
Transactions completed

+X%
Of transactions involve financial investors

X
Debt advisory transactions

+X
Transactions completed each year

Clearwater: Your Team

A senior-led, hands-on deal team with extensive sector expertise

Project leadership

Name Surname
Job Title

+44 7770 123 456
joe.bloggs@clearwatercf.com

- 20+ years of specialist mid-market experience in the Consumer sector with a primary focus on travel.
- Completed 20+ travel sector transactions
- Previously GCA Altium / Houlihan Lokey, Arrowpoint, EY

Job Title: Overall deal leadership

Name Surname
Job Title

+44 7770 123 456
joe.bloggs@clearwatercf.com

- 7+ years deal experience
- Specialist across travel and leisure in the mid-market
- Previously part of the PwC consumer M&A team

Job Title: Day-to-day project management

Name Surname
Job Title

+44 7770 123 456
joe.bloggs@clearwatercf.com

- 6+ years' deal experience
- Member of consumer sector team
- Recently advised ICG on its acquisition of Direct Ferries

Job Title: Day-to-day project management

Clearwater: Your Team

A senior-led, hands-on deal team with extensive sector expertise

Project leadership

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Debt advisory

Name Surname
Job Title

25+ years' debt experience

Modelling & Data Analytics

Name Surname
Job Title

Head of Modelling & Data Analytics

ESG & Impact

Name Surname
Job Title

2+ years' deal experience

Name Surname
Job Title

2+ years' deal experience

Name Surname
Job Title

1+ year deal experience

Name Surname
Job Title

15+ years of experience

Clearwater

Library Graphic Assets



“

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

Name
Company

95%

It is a long-established fact that a reader will be distracted by the readable.



25%

It is a long-established fact that a reader will be distracted by the readable.

35%

It is a long-established fact that a reader will be distracted by the readable.



80%

It is a long-established fact that a reader will be distracted by the readable.

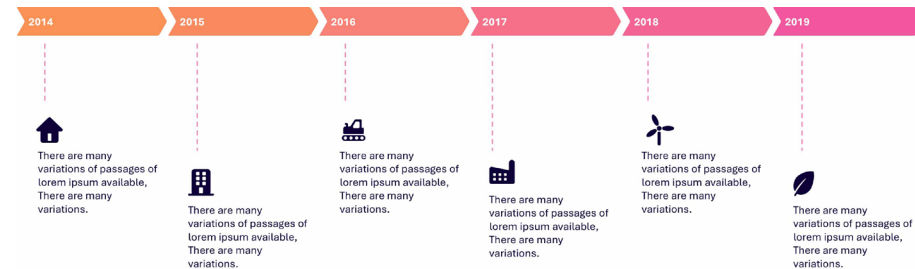
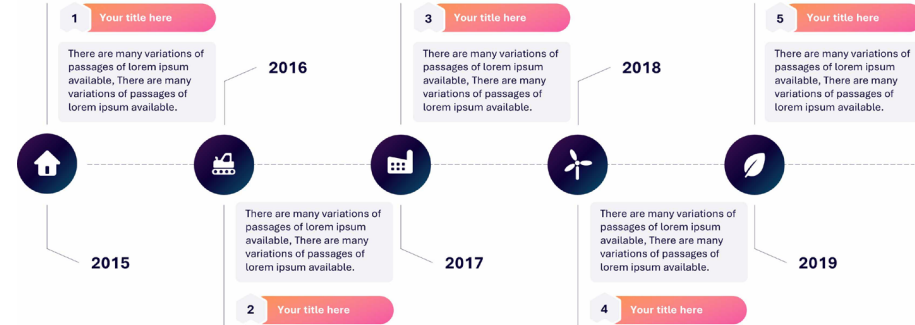


Weaknesses
It is a long-established fact that a reader will be distracted by the readable.

Opportunities
It is a long-established fact that a reader will be distracted by the readable.

Strengths
It is a long-established fact that a reader will be distracted by the readable.

Threats
It is a long-established fact that a reader will be distracted by the readable.



Clearwater

Branded Icons



Automotive



Business Services



Consumer



Energy & Utilities



Financial Services



Lightbulb Off



Lightbulb On



Battery



Environment



Recycling



Food & Beverage



Healthcare



Industrial & Chemicals



Real Estate



TMT



Home



Worksite



Lock



Files



Partnership



100%



75%



50%



25%



0%



Ticked



Unticked



Ticked small



Unticked small

To be used under regular icons, for comparison

Clearwater

PowerPoint Table Styles

AR Quality	AR Number	AR Amount (MEUR)
System Reconciliation issue	19 (26%)	1342 (32%)
Absent	17 (23%)	1135 (27%)
Insufficient	2 (3%)	189 (5%)
Ageing analysis issue	33 (45%)	1336 (32%)
Absent	28% (38%)	1271 (31%)
Insufficient	6 (7%)	65 (2%)
Variance table issue	0	0
Total tested AR	74	4167

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Total tested AR	74	4167

Venturistic

“

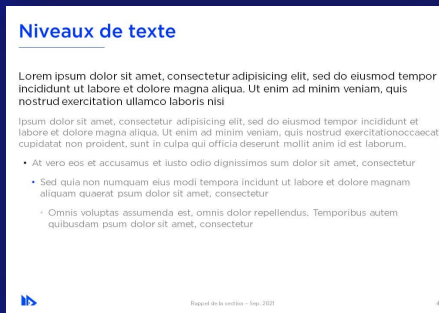
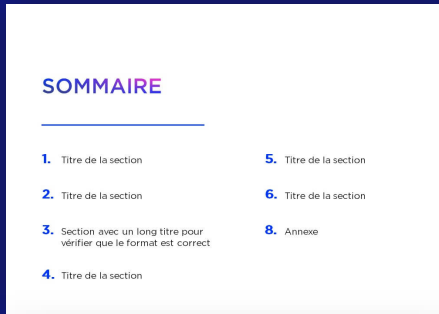
The UpSlide designers were highly proactive and imaginative. We were basically starting from scratch; their creative spirit and bright ideas helped us create a clear and modern visual identity that's reassuring for our customers.

Our collaboration went smoothly and efficiently. We won't hesitate to call on their designers again whenever the need arises.



Alexis Joulié
CEO
Venturistic

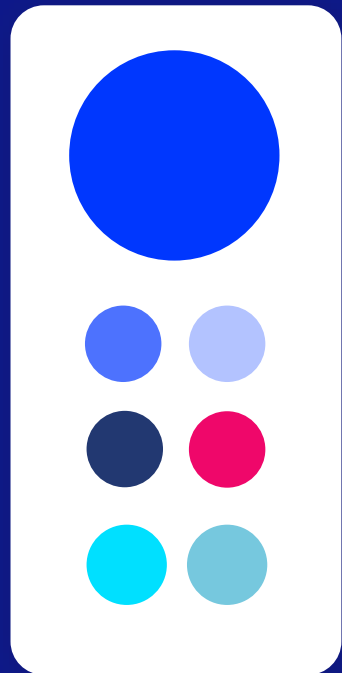
PowerPoint Template



Venturistic

Image Bank

Color Palette



Venturistic

Word Template



Document

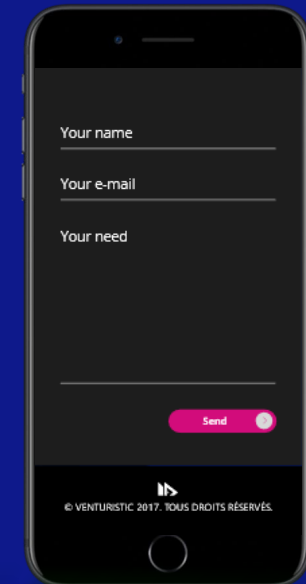


Venturistic

Website - UI



See more



Squareness

“

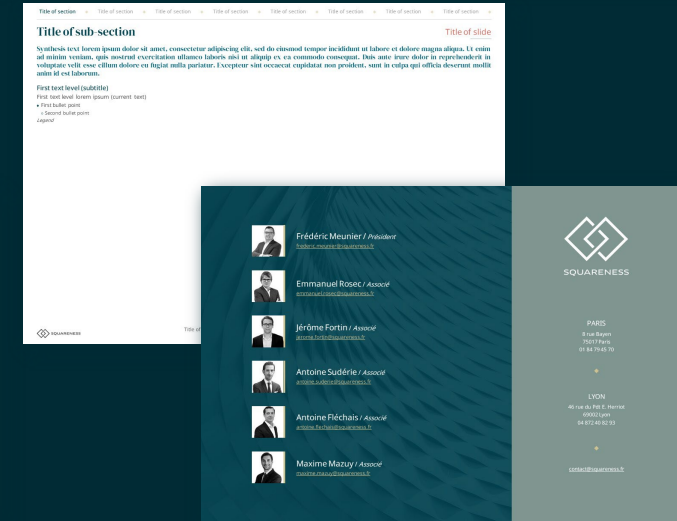
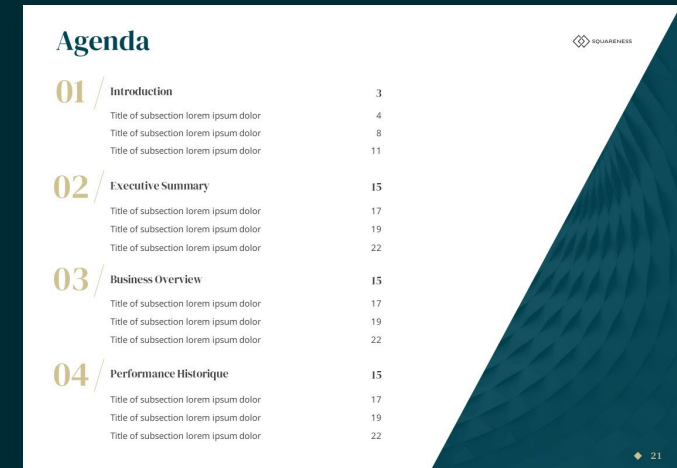
We really appreciated the fluidity of the discussions and the pace of progress. The design studio perfectly captured the image we wanted to convey, while at the same time being a source of suggestions.

The result is well-balanced, up to date and in line with our expectations.



Antoine Sudérie
Associate
Squareness

PowerPoint Template

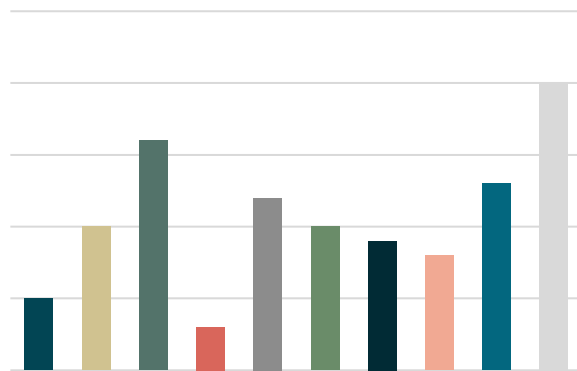
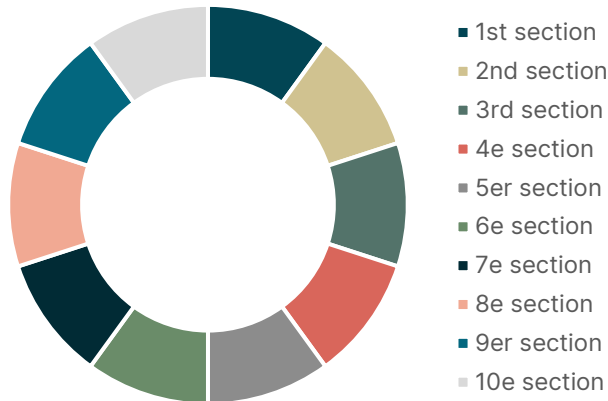


PowerPoint Content Slides

[illegible]

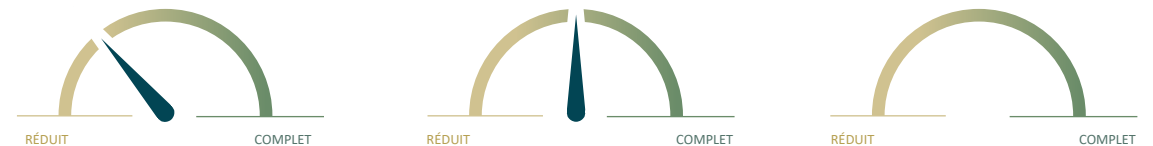
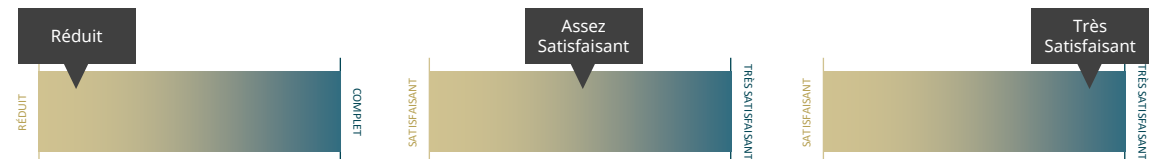
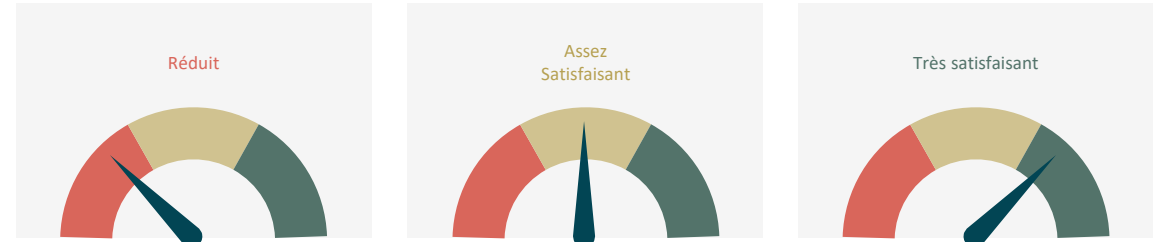
Squareness

Excel Palette



Graphic Assets

Dial charts for due diligence criteria assessment.
(Engagement scope, quality of information, access to management, etc.)



FI Partners

“

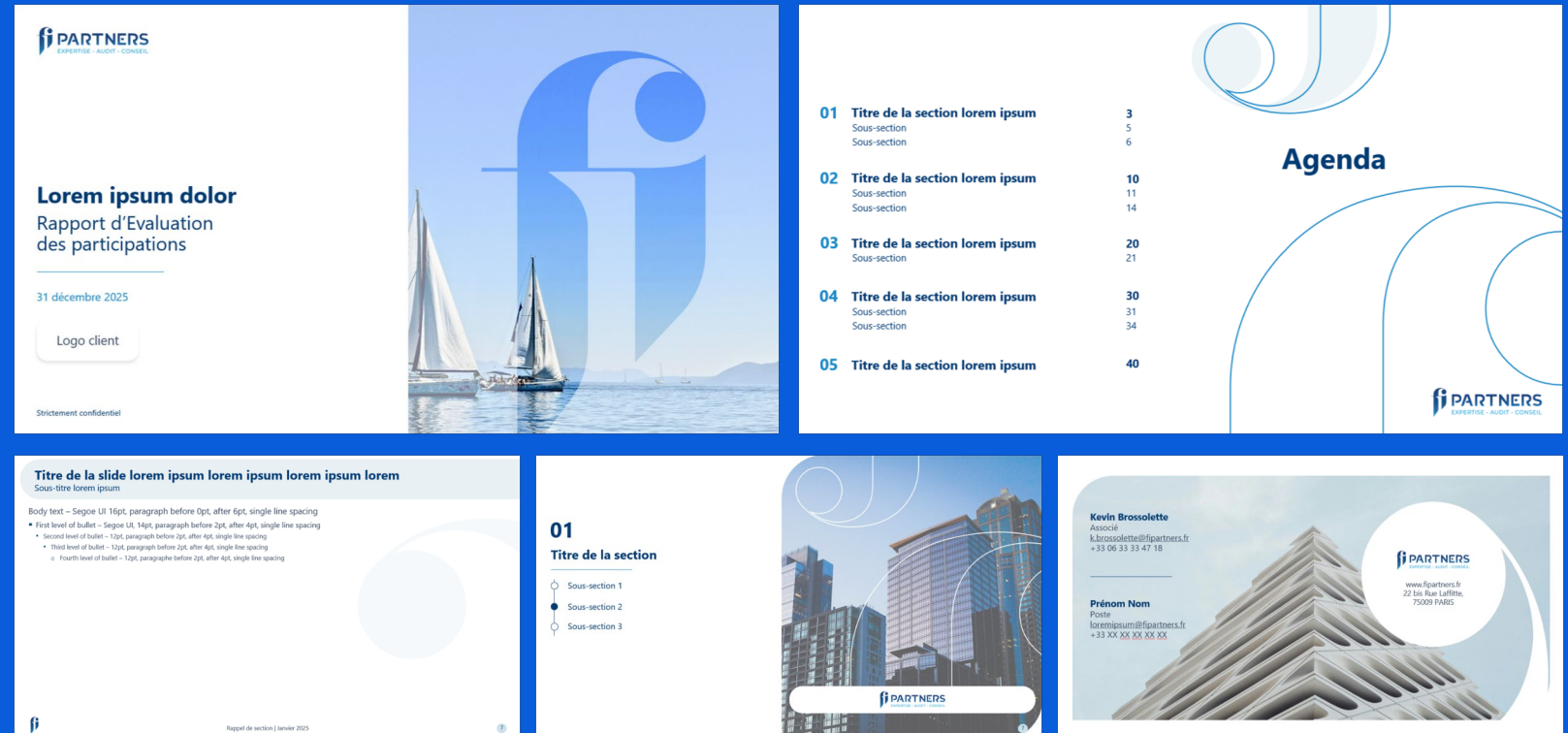
FI Partners reached out to UpSlide to revamp their PowerPoint template, aiming for stronger visual consistency with their brand identity. We then applied the new template to redesign a series of content slides.

The goal: modernize the presentation while making it easier for internal teams to reuse.



Amélie Pantaleone
Design Team Lead
UpSlide

PowerPoint Template



FI Partners

PowerPoint Content Slides

Organisation du cabinet

Mission évaluation AIFM



Kevin Brossolette

Expérience

Expert-Comptable / Commissaire aux comptes, a acquis une solide expérience en Finance d'entreprise et en Evaluation de sociétés non cotées tout au long de son parcours professionnel.

Associé Fondateur de la société PCI (Procédure & Contrôle Interne) créé en 2006, société de conseil dédiée à la conformité des sociétés de gestion de portefeuille.

Qualifications et diplômes

- Commissaire aux comptes inscrit à la CRCC de Paris
- Expert-comptable inscrit à l'OECC de Paris IDF
- Expert en Evaluation d'Entreprise certifié (Cursus de formation sur 2 ans conçu par la Compagnie des Conseils et Experts Financiers)



Adrien Mona

Expérience

Ancien Expert en Evaluation Immobilière, il dispose d'une expérience de plus de 5 ans acquise auprès de JLL Expertises, cabinet de conseil en immobilier d'entreprises reconnu de la place.

Responsable des Expertises de la Société de Gestion de Portefeuille Allianz Immobilier pendant plus de 2 ans, il bénéficie d'une solide expérience dans l'**Évaluation indépendante AIFM**.

Qualifications et diplômes

- Master 2 en Finance - Sciences de l'immobilier
- Master Sciences de Gestion

Organisation du cabinet

Mission évaluation AIFM



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Expérience

Ancien Expert en Evaluation Immobilière, il dispose d'une expérience de plus de 5 ans acquise auprès de JLL Expertises, cabinet de conseil en immobilier d'entreprises reconnu de la place.

Responsable des Expertises de la Société de Gestion de Portefeuille Allianz Immobilier pendant plus de 2 ans, il bénéficie d'une solide expérience dans l'**Évaluation indépendante AIFM**.

Qualifications et diplômes

- Master 2 en Finance - Sciences de l'immobilier
- Master Sciences de Gestion

Fiche d'identité

FI Partners est une **société d'indépendance créée en 2013**, spécialisée dans les services comptables et financiers liés aux sociétés de gestion de portefeuille.

FI Partners emploie **11 collaborateurs** (dont 4 personnes dédiées à l'évaluation AIFM).

Dénomination de la société : FI PARTNERS

Statut juridique : SARL

Capital : 40000 €

Date de création : 06/2013

SIRET : 793 043 241 00025

Adresse : 22, bis rue Laffitte, 75009 Paris

Personne en charge

Brossolette Kevin, Gérant, inscrit au tableau de l'Ordre des Experts-Comptables de Paris et sur la liste des commissaires aux comptes auprès de la CRCC de Paris depuis le 27 septembre 2011.

06 33 33 47 18 - kbrossolette@fipartners.fr

FI PARTNERS est référencée auprès de l'AMF en tant que :

Commissaire aux comptes de l'FCI/FCU/SCPI/OPC

Evaluateur indépendant « AIFM »

Ressources

Associations professionnelles

Le cabinet FI PARTNERS est membre de plusieurs associations dont le respect des règles garanti **des travaux de valorisation en ligne avec les meilleurs standards du métier**.



Code de déontologie et normes des experts-comptables & Commissaire aux comptes



Membre du CCEF (Compagnie des Conseils et Experts Financiers) qui a conçu un cursus de formation sur deux ans en « spécialisation évaluation d'entreprise ». Le programme couvre l'analyse stratégique, le corporate finance, la conduite de la mission, les normes IFRS, l'évaluation et l'expertise financière.



Membre de la SFEV (Société Française des Évaluateurs) qui a pour but de réunir l'ensemble des personnes intéressées par l'évaluation financière afin de favoriser l'émergence et la reconnaissance des meilleures pratiques en promouvant l'utilisation des techniques d'évaluation les plus récentes. La SFEV a défini également les standards professionnels que les experts en évaluation s'engagent à respecter dans leurs travaux.

Ressources

Associations professionnelles

Formation continue

CCF Membre de la commission d'évaluation du CCEF

SFEV Participations aux réunions de la « SFEV », à la journée d'évaluation de la CRCC

FRANCE INVEST Suivi des évolutions des IPEV Valuation Guidelines chez France Invest

Sources d'information

CINEAS Abonnement base de données Immobilières : CF News Immo

Infront Abonnement à In Front Analytics Platform : Base de données financières

infogole Abonnement infogole

Ces différentes sources d'information permettent au cabinet FI PARTNERS d'alimenter une **base de données** relative à toutes informations liées aux **évaluations du marché des entreprises**.

Organisation du cabinet

Mission évaluation AIFM



Kevin Brossolette

Responsable et signataire des missions d'évaluation du cabinet



Léonard Spielmann

Référent Immobilier



Adrien Mona

Référent Immobilier

NewCo Corporate Finance

“

A big thank you to the UpSlide team for the quality of their support. They were able to **understand our needs, make valuable suggestions, and challenge us constructively** throughout the project.

The exchanges were smooth and efficient, and we are very satisfied with the final result. We highly recommend their services!

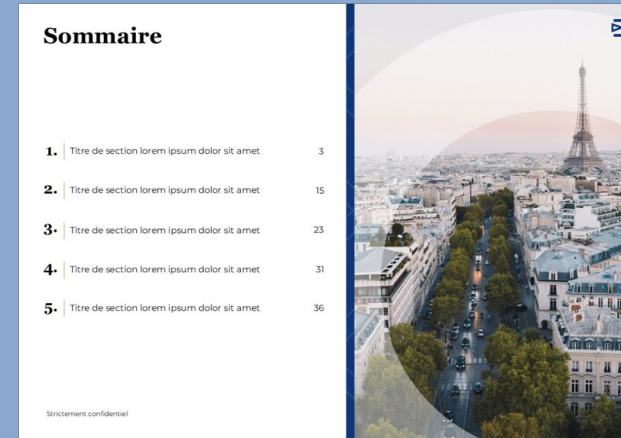


Paul Renou

Analyst

NewCo Corporate Finance

PowerPoint Template



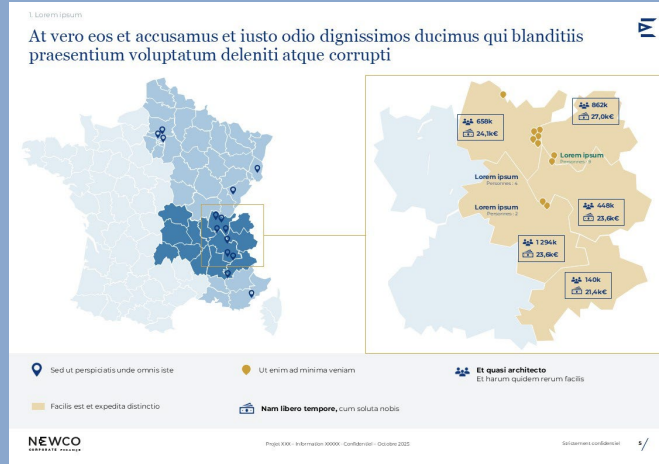
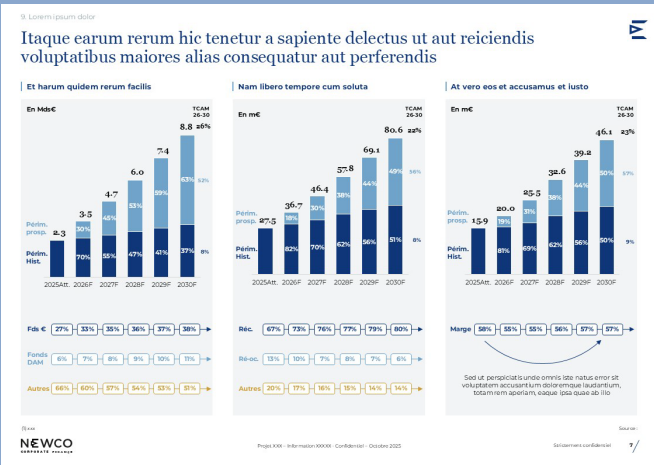
Monogram Creation



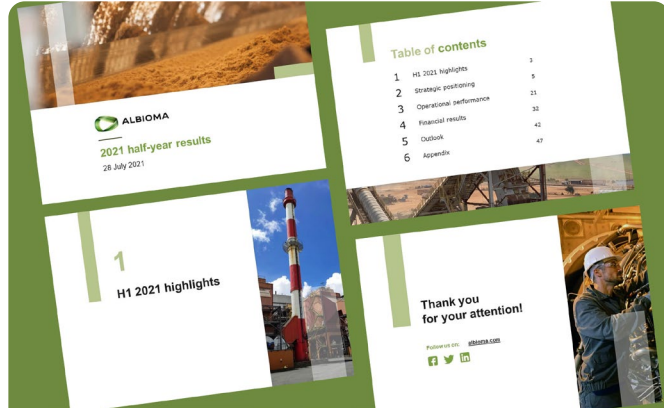
Design Explorations

NewCo Corporate Finance

PowerPoint Content Slides



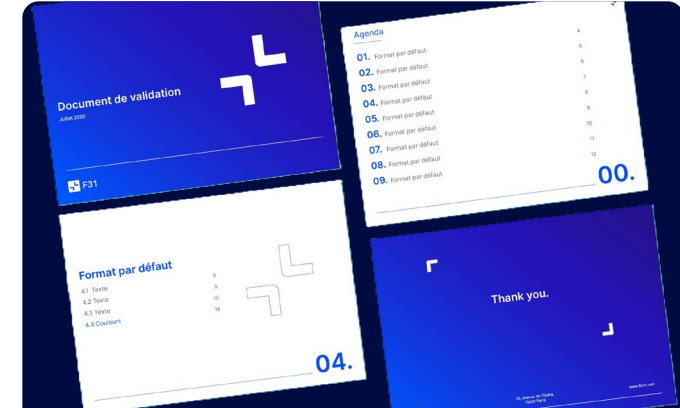
Corporate



Albioma



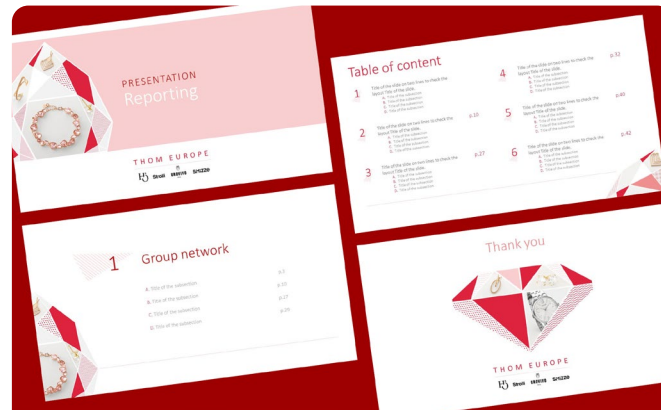
Elsan



F31



L'Oréal



Thom Europe



Aramis Group

Albioma

“

The UpSlide teams helped us to overhaul our PowerPoint template. **Everyone in our company was won over by the result. What's more, we enjoyed productive, free-flowing exchanges throughout the project.** Thank you!



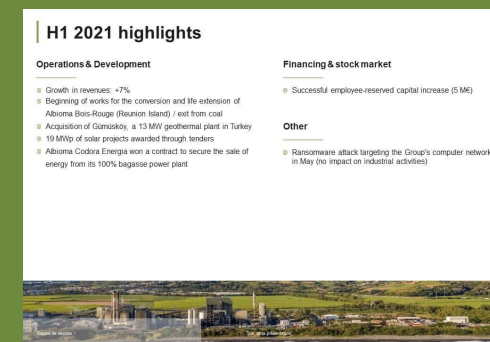
Eloïse Sablon

Communication Officer
Albioma

PowerPoint Template

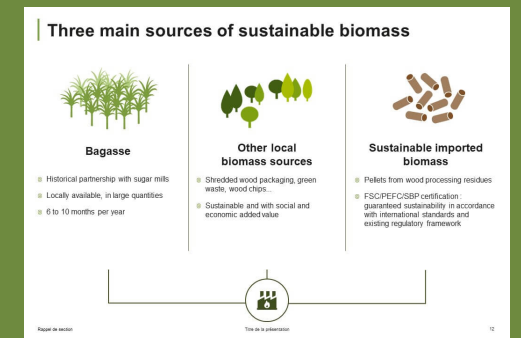
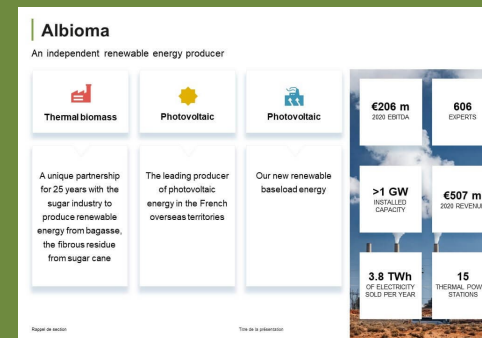
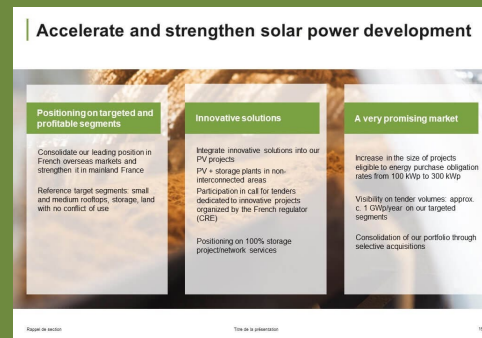
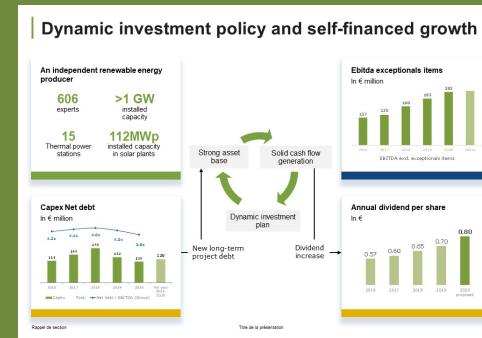
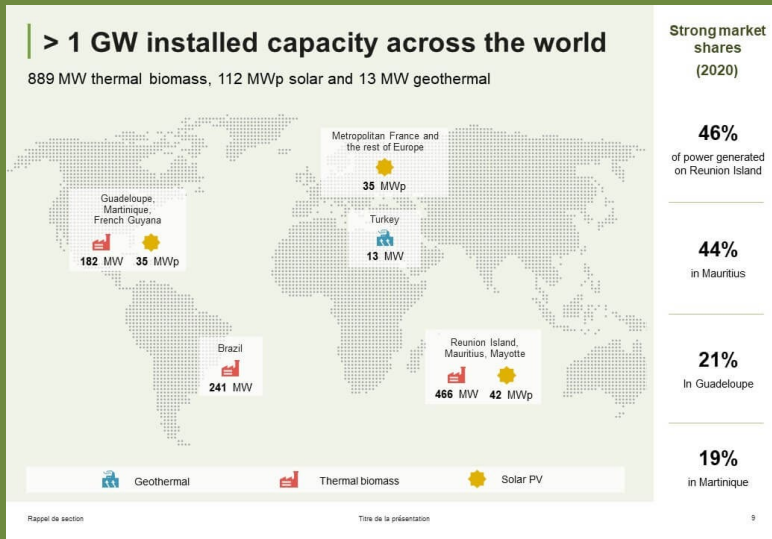


Table of contents		
1	H1 2021 highlights	3
2	Strategic positioning	5
3	Operational performance	21
4	Financial results	32
5	Outlook	42
6	Appendix	47



Albioma

PowerPoint Content Slides



Elsan

“

Elsan called on the design studio to **redesign their PowerPoint template**, intended not only for their UpSlide users but also **for their entire staff**.

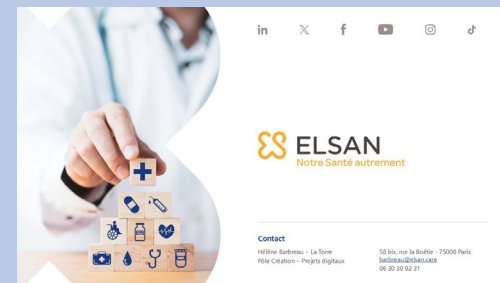
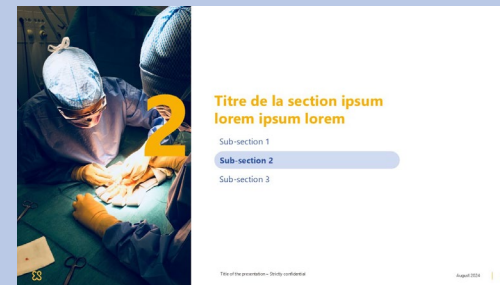
They wanted to reduce the proportion of orange used in the template in favor of a blue, which is taken from their guidelines and is more aligned with the sector.

We suggested **they use their logo as a recurring and distinctive graphic element**.



Amélie Pantaleone
Design Team Lead
UpSlide

PowerPoint Template



F31

“

The UpSlide designers took charge of the entire project, from the design of the logo to the production of communication materials, such as the event banner or email signature. We were very pleased with the way in which the project was conducted and the quality of their support.

Right from the very first meeting, we were able to appreciate their considerable involvement in this project and their desire to push even more to surpass our expectations. We are proud of the result and won't think twice about working with UpSlide again to give our visual identity a facelift.



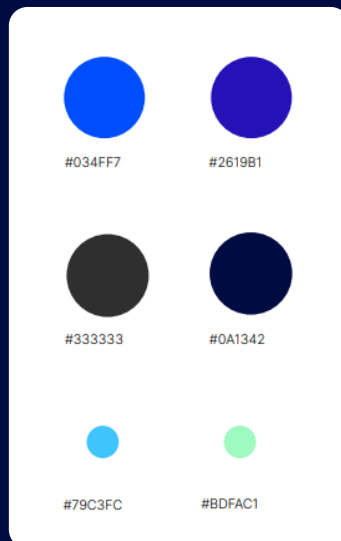
Maria Makarova

CEO
F31

Logo



Color Palette



Typography

Inter Regular

Utilisée pour tout texte.
Typographie Open Source.

Aa Bb Cc Dd Ee Ff Gg Hh Ii
Jj Kk Ll Mm Nn Oo Pp Qq Rr
Ss Tt Uu Vv Ww Xx Yy Zz
0 1 2 3 4 5 6 7 8 9 # , ({ [-] }) > < & @ ! ? .

Le vif zéphyr jubile sur les
kumquats du clown gracieux !

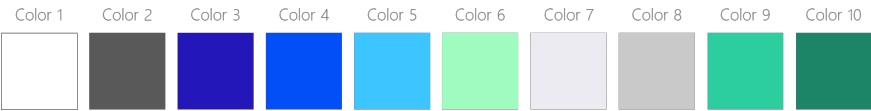
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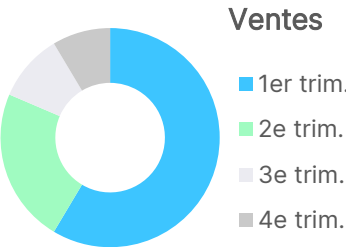
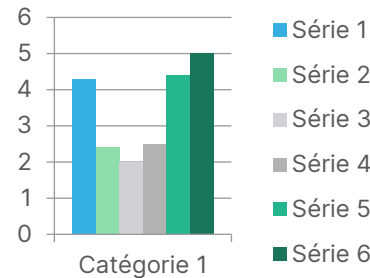
Primaire	Exergue
 #333333	 #034FF7
51/51/51	3/79/247
70/60/56/68	91/65/0/0

F31

Colors



Office Color Chart and Excel Styles



Power BI
Dashboard Format



Spreadsheet Format

Business Plan

IRR 14,28%

	2020	2021	2022	2023	2024	2025	2026	2027	2028	2029
FINANCIAL STATEMENTS (k€)										
REVENUES	64 301	-	1 184	3 298	3 935	4 008	4 084	3 755	4 260	4 343
% revenues	n/a	n/a	178,0%	5,1%	6,1%	6,2%	6,3%	5,8%	6,6%	6,7%
O&M	(12 213)	-	(278)	(790)	(805)	(820)	(835)	(850)	(865)	(880)
Staff costs	(9 402)	-	(18)	(493)	(588)	(599)	(611)	(624)	(637)	(650)
Rent	(2 996)	-	(72)	(176)	(179)	(183)	(186)	(190)	(193)	(197)
Administrative costs	(1 733)	(25)	(70)	(99)	(101)	(102)	(104)	(106)	(108)	(110)
Major maintenance	(1 500)	-	-	-	-	-	(750)	-	-	-
Other recurring opex	(5 333)	-	(44)	(96)	(220)	(380)	(378)	(369)	(388)	(390)
TOTAL OPEX	(33 181)	(25)	(204)	(1 139)	(1 877)	(2 070)	(2 100)	(2 128)	(2 176)	(2 212)
EBITDA	31 120	(25)	980	2 159	2 057	1 938	1 985	1 027	2 084	2 131
% revenues	48,4%	n/a	82,8%	65,5%	52,3%	48,4%	48,6%	27,4%	48,9%	49,3%
Depreciation	(15 636)	-	(505)	(1 213)	(1 213)	(1 213)	(1 213)	(1 263)	(1 263)	(1 263)
EBIT	15 484	(25)	475	946	844	725	771	(236)	821	868
% revenues	24,1%	n/a	40,1%	28,7%	21,2%	18,1%	19,0%	-5,8%	19,3%	20,0%
Interests on bank loan	(178)	(36)	(140)	-	-	-	-	-	-	-
Interests on shareholders' loan	(1 781)	-	(101)	(236)	(220)	(204)	(187)	(169)	(151)	(133)
EBT	13 527	(61)	233	709	624	522	585	(405)	670	735
% revenues	21,0%	n/a	19,3%	21,5%	15,3%	12,8%	14,3%	-6,3%	15,7%	16,9%
Corporate income tax	(1 538)	-	-	-	-	-	-	-	-	-
Net Income	11 997	(61)	233	709	624	522	585	(405)	670	735
% revenues	18,7%	n/a	19,3%	21,5%	15,3%	12,8%	14,3%	-6,3%	15,7%	16,9%

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Word Template

Déroulement d'un rapport interactif

Déroulement de nos travaux et estimation de temps

Nos travaux se dérouleront sur **X semaines, soit X semaines d'une semaine** à compter de votre acceptation de ce devis (cf. planning indicatif ci-dessous).

Nous vous proposons d'organiser le projet par itération conformément à la méthode agile. Afin d'intégrer vos souhaits de modification au fil de l'eau, en fin de chaque itération :

- Nous vous présentons les avancées de la semaine
- Nous identifions ensemble les modifications à apporter ou les fonctionnalités restant à développer
- Nous prioriserons ensemble les développements à intégrer lors de la prochaine itération

Pour le bon déroulement du projet, vous désignez un interlocuteur unique à même de prioriser et valider les développements.

Nous comptons donc sur sa disponibilité pour une réunion d'environ 2 heures chaque semaine des échanges ponctuels par téléphone.

Au choix, un Gantt (bibliothèque L'opéra d'Excel) ou un tableau des développements

	Bloc 1	Bloc 2	Bloc 3	Total 4	Bloc 5	Bloc 6	Bloc 7
1. Bloc 1							
2. Bloc 2							
3. Bloc 3							
4. Bloc 4							
5. Bloc 5							
6. Bloc 6							
7. Bloc 7							

Bloc	Développement	Temps (jours)
Bloc 1	Développement 1	X
Bloc 2	Développement 2	X
Bloc 3	Développement 3	X
Bloc 4	Développement 4	X
...	...	X
Total		X

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Développement d'un rapport interactif

Objectif

Le projet comporte 3 objectifs principaux

- ...
- ...
- ...

Prestation proposée

Synopsis d'une proposition similaire

Afin de répondre à votre besoin, nous vous proposons de ...

Qualité des livrables

Votre nouvel outil sera développé conformément aux standards d'excellence de Finance 3.1. Notre triple expertise technique, financière et design nous permet de garantir qu'à l'issue du projet vous bénéficierez d'une solution:

- Performante, avec une structure d'ensemble et des calculs optimisés, respectant les bonnes pratiques de modélisation financière sur Excel et/ou de développement informatique en langage VBA, MA, DAX
- Transparente, avec des formules aussi simples que possible, des variables explicites et un code clairement commenté permettant aux futurs administrateurs de l'outil de facilement se l'approprier et le faire évoluer
- Ergonomique, avec un parcours-utilisateur fluide, sécurisé, et un soin particulier apporté au design des interfaces



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2/6

PowerPoint Template

Document de validation

Juillet 2020

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Agenda

01. Format par défaut	4
02. Format par défaut	5
03. Format par défaut	6
04. Format par défaut	7
05. Format par défaut	8
06. Format par défaut	9
07. Format par défaut	10
08. Format par défaut	11
09. Format par défaut	12

00.

Format par défaut

4.1 Texte	8
4.2 Texte	9
4.3 Texte	10
4.4 Couleurs	16

04.

Thank you.

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F31

PowerPoint Content Slides

Nos réalisations

Modèles financiers

“ F31 nous a apporté une double expertise en modélisation d'outils Excel soignés et ergonomiques et en analyses financières appropriées à notre activité. ”

Arnaud Maréchal,
CFO Orange Digital Ventures



2

Power BI niveau 1 : premier reporting avec Power BI

Public	Niveau requis	Matériel requis	Format	Tarif
Professionnels de la finance souhaitant apprendre à construire des dashboards interactifs pertinents	Aucune expérience avec Power BI requise	Un ordinateur portable (PC) équipé de Power BI Desktop	3 demi-journées dans nos locaux ou en distanciel	4 500 € HT (5 participants max en distanciel et 10 participants max en présentiel)

01. Introduction

Comprendre l'utilité de Power BI

- Qu'est-ce que Power BI ?
- Comprendre la self-service BI
- Les étapes pour construire un dashboard Power BI
- Power BI vs ses concurrents
- Présentation du cas pratique

02. Modélisation

Préparer et organiser ses données sources

- Se connecter aux données
- Introduction à Power Query
- Transformer et nettoyer ses données
- Enrichir ses données
- Construire un modèle de données
- Identifier les clés dans ses tables
- Relations entre les tables

03. Visualisation

Construire et présenter des indicateurs pertinents pour son reporting

- Introduction au DAX
- Calculs d'indicateurs simples
- Calculs de ratio
- Création de visuels
- Gestion des filtres
- UX

04. Partage

Partager ses reportings au sein de son organisation

- Publier un rapport et le partager
- Partage de bonnes pratiques
- Correction et O&A sur le cas pratique

11

Our Power BI expertise

IMPORT

- Files (XLS, CSV)
- Data Bases (SQL, Oracle)
- Online (SaaS, APIs)

PROCESS

- Data Consolidation
- Data Analyses
- Data Visualisation

PUBLICATION

- PC
- Smartphone
- Tablet

4

L'expertise de F31

01. Modèles Financiers

Des modèles fiables et optimisés pour des résultats clairs

02. Business Intelligence

La technologie Power BI dynamique et design

03. Applications métier

La souplesse d'Excel et de la Power Platform au service des demandes particulières

Des outils sur mesure pour vos prises de décision

2

Notre méthodologie

Une nouvelle version toutes les semaines pour suivre l'avancement et co-construire la solution

Nous travaillons en méthode agile, par itération d'une semaine.

Nos clients sont fortement impliqués dans le projet, participant à chaque itération.

Nous restons proches de nos clients et les accompagnons dans les évolutions futures des outils développés.

3

Etapes initiant un projet

Objectifs de la phase préliminaire : définir la solution optimale, s'accorder sur les livrables attendus, dresser le planning et chiffrer le projet.

Premier rendez-vous

1 Expression du besoin, validation de la pertinence de notre solution

XX semaine

Proposition commerciale

3 Ajustements et mise en place d'un accord

XX semaine

Réunion Kick-off

5

XX semaine

2 Nous sommes ici

Formalisation du besoin par F31

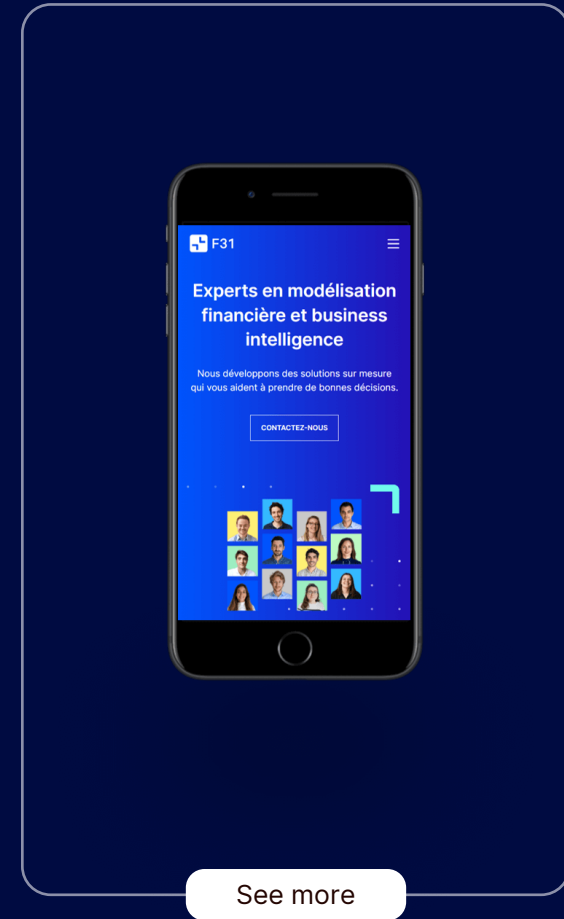
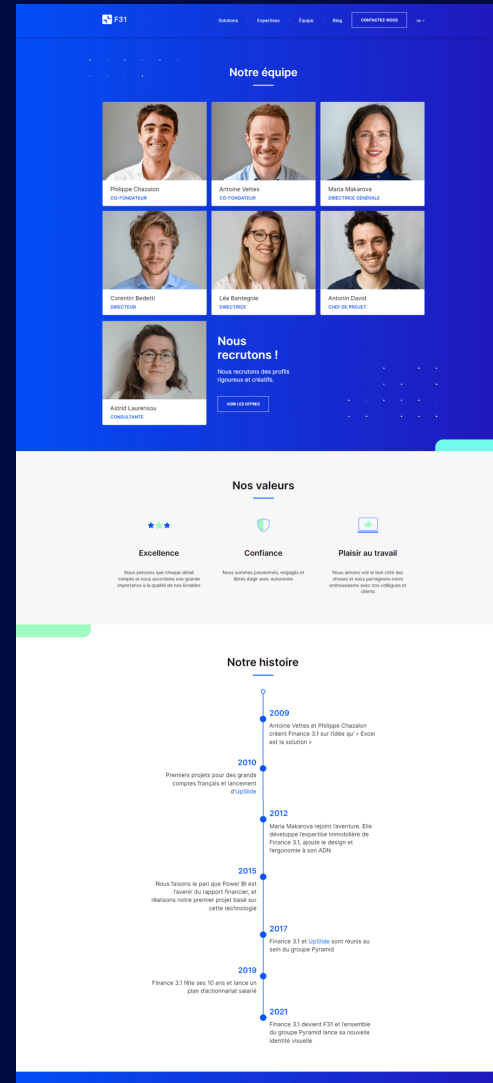
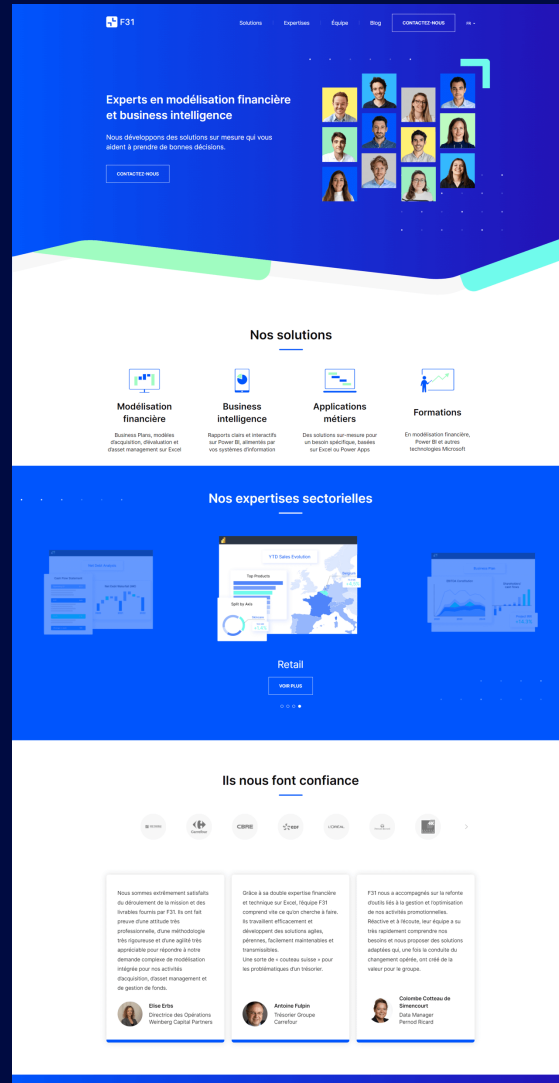
4 Signature

Lancement du projet

16

F31

Website

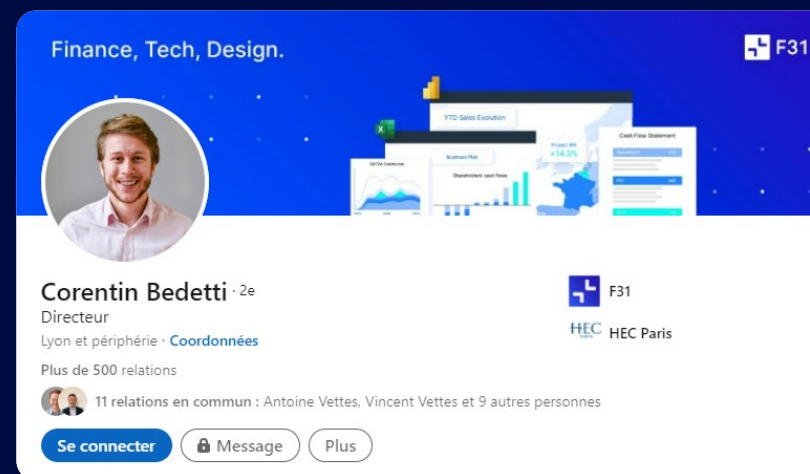


F31

Roll-up Banners



LinkedIn Banners



L'Oréal

“

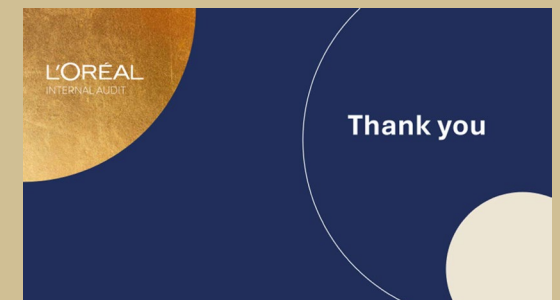
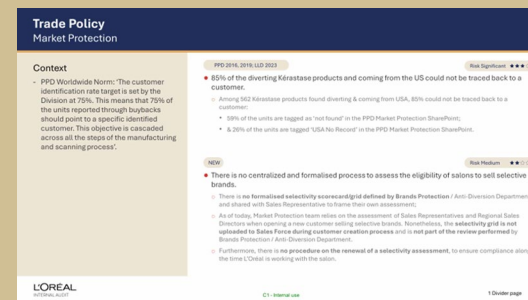
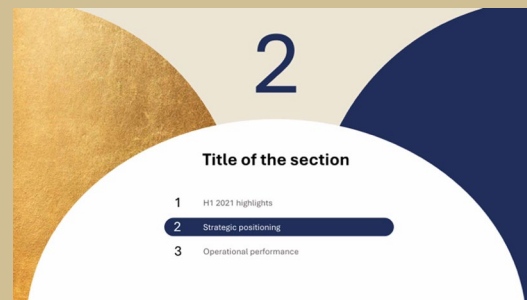
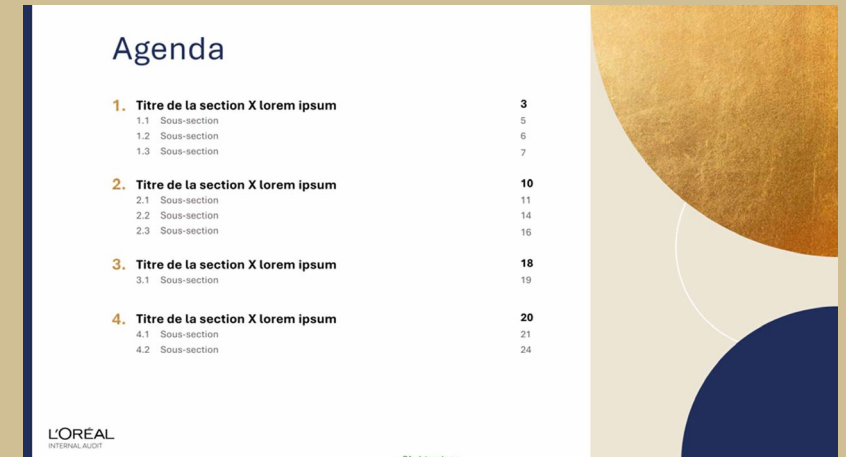
The Internal Audit team at L'Oréal contacted us to overhaul their PowerPoint template.

In turn, we worked with them to create various content slide templates tailored to their highly specific business needs, including labels to be added to the library.



Amélie Pantaleone
Design Team Lead
UpSlide

PowerPoint Template



L'Oréal

Main shared recommendations 1

Slide subtitle

SALES AND CUSTOMERS

Assign in Sales, Credit and Customer Service Policies responsibilities between Divisions, BEST, and Local Teams for Customer Database operations (including D&B setup in SAP), A/R management and order unblocking.

➔

Define a buyback strategy and targets by Security Team to be performed by L'Oréal teams

➔

Consider extending IT support to L'Oréal Caribe teams to deploy tools or streamline processes such as Sales Forecasts and Promotional Planning

•

Sub-recommendation text lorem ipsum dolor sit amet

•

Sub-recommendation text lorem ipsum dolor sit amet

L'OREAL

INTERNAL AUDIT

Mission name - Name of the presentation

C1 - Internal use

Name of the section

9

Slides and Audit Label

The of the slide lorem ipsum

Slide subtitle

Risk Significant

★★★★

CPD

ACD

LLD

PPD

Risk Significant

★★★

CPD

ACD

LLD

PPD

Risk of xxxxxx

Risk of xxxxxx

Risk of reputation

CONTEXT

-

There is no special pricing or promotions for online retailers except the funding agreement made with Nordstrom (7% commission for all online sales in contract)

-

An omni channel approach is followed by Local Management in that there are no specific agreements on pricing online vs. offline- No deviations have been identified as per Local Management

-

Employees are required to complete TWWC training in the HRIS tool depending on their job responsibility

•

Of the 790 active employees, 321 employees (representing 40% of total eligible employees) have not completed The Way We Compete training

○

All 321 employees are in Retail Stores

○

Retail employees have access to My Learning at the stores however, there is not monitoring of the compliance and completion of this training by District Managers or HR

•

Lorem ipsum dolor sit amet

•

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○

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Retail employees have access to My Learning at the stores however, there is not monitoring of the compliance and completion of this training by District Managers or HR

•

Lorem ipsum dolor sit amet

L'OREAL

INTERNAL AUDIT

Mission name - Name of the presentation

C1 - Internal use

Name of the section

9

Risk Significant

CPD ACD LLD PPD

Risk Significant

Sustainability

Risk Significant

Excel Styles

Tables

L'Oréal

L'Oréal Mission

		2024	
		Grade	
		Main Points	
A - PUR.1	Manage suppliers	+	+
A - PUR.1.1	SCOT&SF Purchases	+	+
A - PUR.1.1	Respect Purchasing policy and Code of Ethics	+	+
A - PUR.1.2	Reference suppliers and open supplier accounts (including subcontractors)	+	+
A - PUR.1.3	Manage supplier selection through request for quotations (RFQ) and price requests	+	+
A - PUR.1.4	Manage supplier contracts (including subcontractors, excluding Media)	+	+
A - PUR.1.5	Manage suppliers' database (payment terms, bank account, address)	+	+
A - PUR.1.6	Analyze Purchasing performance (indirect): only applicable for Sourcing Centers (and not Affiliates)	N	NA
A - PUR.1.6	Manage & follow supplier performance	+	+
A - PUR.1.10	Manage & follow disputes with suppliers	+	+
A - PUR.2	Procure to pay	+	+

AR Quality	AR Number	AR Amount (M€/UR)
A. System Reconciliation issue	19 (20%)	1342 (32%)
Absent	17 (22%)	1199 (27%)
Insufficient	2 (3%)	189 (5%)
B. Aging analysis issue	33 (45%)	1336 (32%)
Absent	28% (38%)	1271 (31%)
Insufficient	6 (7%)	65 (2%)
C. Variance table issue	0	0
Total tested AR	74	4167

L'OREAL

INTERNAL AUDIT

Mission name - Name of the presentation

C1 - Internal use

Name of the section

9

Colors, polices

L'Oréal on PowerPoint and Excel

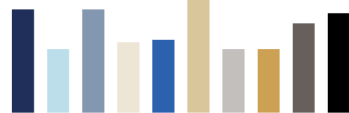
Order of colours in PowerPoint:

Font: Aptos



Order of colours in Excel: Proposal

Font: Aptos



L'OREAL

INTERNAL AUDIT

C1 - Internal use

Thom Europe

“

The head of the management control department sought to modernize Thom Europe's visual identity.

He called on the UpSlide designers to deliver an automated PowerPoint template that can be updated in line with their collections.

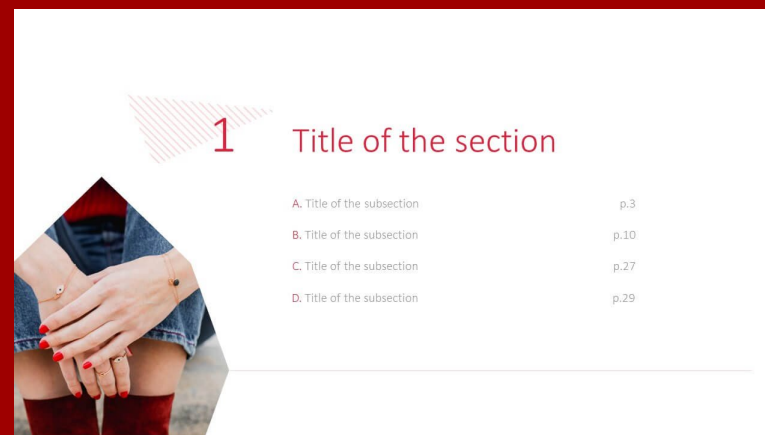
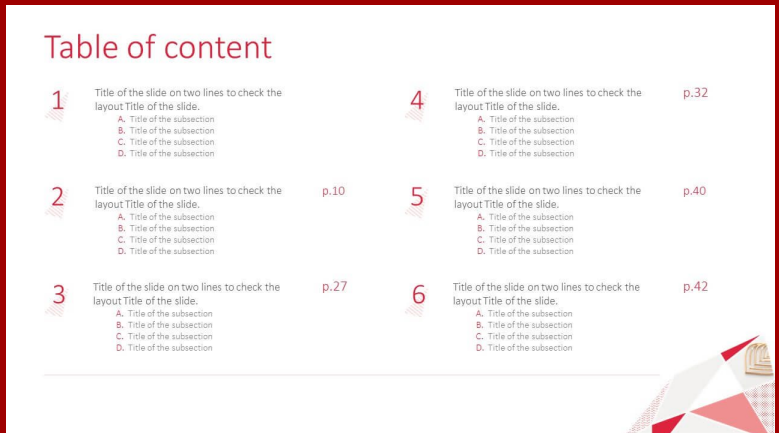
We preconfigured reserved spaces to independently modify the photos that feature on the front and back covers.



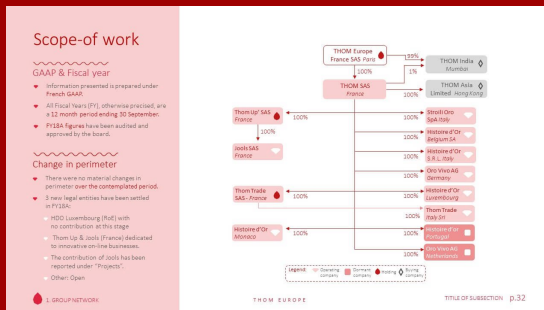
Amélie Pantaleone

Design Team Lead
UpSlide

PowerPoint Template



PowerPoint Content Slides



3 CHANGE IN PERIMETER

New legal entities have been settled in FY18A

All stores excluding (i) store closed during the year, (ii) openings during the previous and current FY, and (iii) affiliated stores;

- ♥ E-commerce
- ♥ EBITDA Reported comprises the restatement of the contribution of stores closed during the FY.
- ♥ EBITDA PF corresponds to EBITDA Reported and includes the full year effect of openings under the "PF adjustment".
- ♥ PF adjustments corresponds to the 12 month contribution of openings based on an extrapolation of actual performance less actual contribution since the acquisition.
- ♥ EBITDA TLB is in accordance with TLB undertakings definition for leverage.

Map Legend:

- Group Footprint (Pink area)
- Headquarter (Red dot)
- Buying office (Black dot)

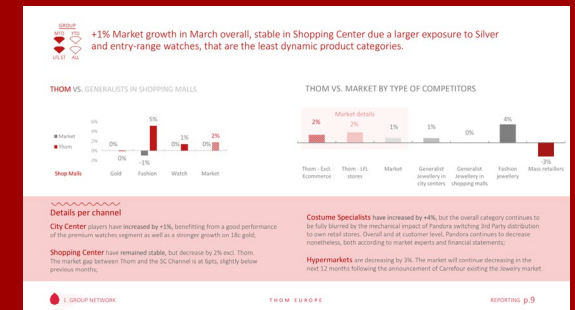
Callout Details:

- LUXEMBOURG - July 19A**
 - Scores: 10
 - Website: 2065
 - Stroll: [Redacted]
- GERMANY - Munich - July 19A**
 - Scores: 10
 - Website: 2065
 - Stroll: [Redacted]
- ITALY - Milano & Anara - July 19A**
 - Scores: 10
 - Website: 2065
 - Stroll: [Redacted]
- FRANCE - Paris - July 19A**
 - Scores: 2065
 - Website: [Redacted]
 - Stroll: [Redacted]
- Hong Kong - Buying office - July 19A**
 - Legal entity: 1
- INDIA - Buying office - July 19A**
 - Legal entity: [Redacted]

Summary Table:

Shop, Mail	FRANCE	ITALY	RoE	JULY 19A
Scores	10	3	6	220
Websites	2065	66	14	409

THOM EUROPE



Aramis Group

“

Excellent communication throughout the project, deadlines met, diverse graphic proposals, and great responsiveness in taking feedback into account.



Thomas Benkahla
Strategy & M&A Associate
Aramis Group

PowerPoint Template

ARAMIS GROUP

Titre de la
présentation lorem
ipsum dolor sit

Sous-titre de la présentation
lorem ipsum dolor lorem

5 avril 2025

Strictement confidentiel

ARAMIS GROUP

Agenda

01	Titre de la section lorem ipsum	3
02	Titre de la section lorem ipsum	10
03	Titre de la section lorem ipsum	20
04	Titre de la section lorem ipsum	30
05	Titre de la section lorem ipsum	40
06	Titre de la section lorem ipsum	40
07	Titre de la section lorem ipsum	40
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09	Titre de la section lorem ipsum	40
10	Titre de la section lorem ipsum	40
11	Titre de la section lorem ipsum	40

Strictement confidentiel

ARAMIS GROUP

01

Titre de la section lorem ipsum dolor

Titre de sous-section lorem ipsum

Titre de sous-section

Titre de sous-section

Strictement confidentiel

Rapport de section

Rappel de sous-section

A sum of sizeable local markets, each one with its own specificities

Body text - Trebuchet MS, 14pt, paragraph before 0pt, after 6pt, single line spacing

• First level of bullet - Trebuchet MS, 12pt, paragraph before 2pt, after 4pt, single line spacing

- o Second level of bullet - 10pt, paragraph before 2pt, after 4pt, single line spacing
 - Third level of bullet - 10pt, paragraph before 2pt, after 4pt, single line spacing

Source lorem ipsum

ARAMIS GROUP

Titre de la présentation avril 2025

Strictement confidentiel

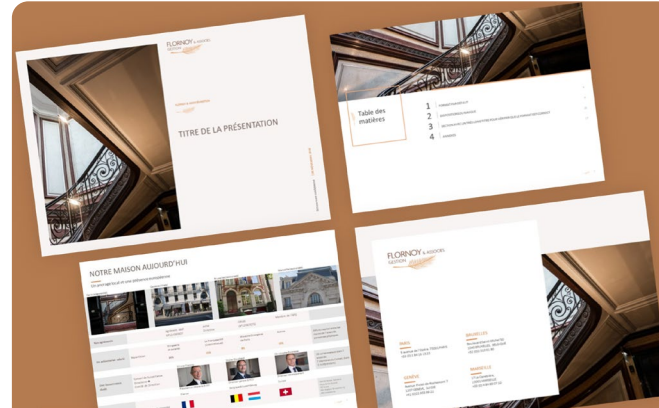
7

ARAMIS GROUP

Banking



Société Générale



Flornoy & Associés Gestion

Société Générale

“

Société Générale came back to UpSlide to brush up the Word template that we had created four years prior.

They wanted a design integrating 3D effects, and a meticulous focus on the styles of the texts to produce high-quality requests for proposals (RFPs), in line with the Group's brand identity.

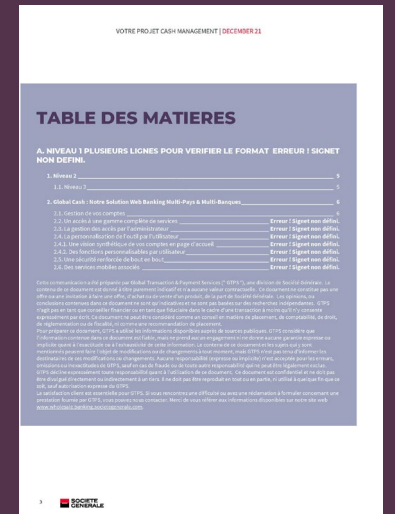


Amélie Pantaleone
Design Team Lead
UpSlide

Word Template



Présenté à Client
[Prénom NOM]
(Poste)
[Prénom NOM]
(Poste)
[Prénom NOM]
(Poste)



Flornoy & Associés Gestion

“

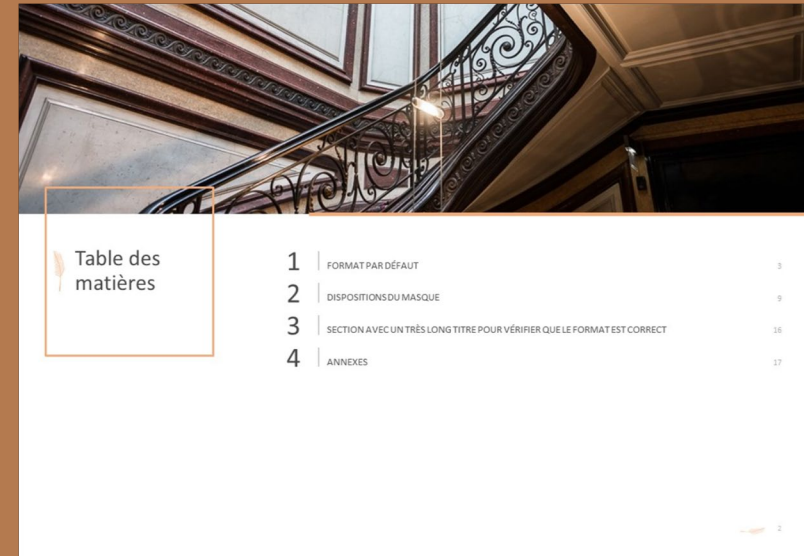
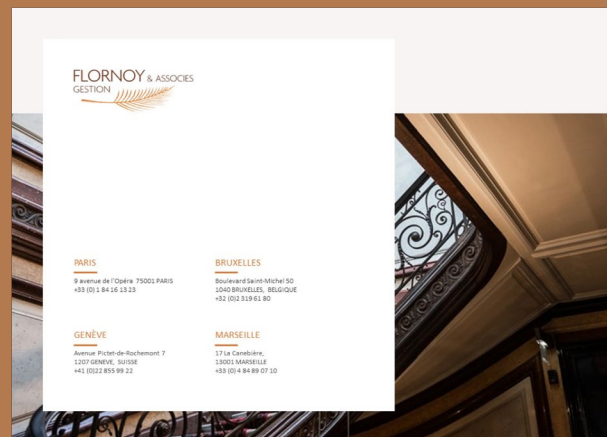
Flornoy's Wealth Management team called on our services to devise a new, more modern visual identity and refresh their PowerPoint template.



Amélie Pantaleone

Design Team Lead
UpSlide

PowerPoint Template



Flornoy & Associés Gestion

PowerPoint Content Slides

NOTRE MAISON AUJOURD'HUI

Un ancrage local et une présence européenne

Paris (siège social)	Genève (filiale)	Bruxelles (succursale)	Marseille (succursale)			
Nos agréments	Agrément AMF GP12-000007	AIFM Directive	ORIAS (N°12057075)	Membre de l'AFG		
Un actionariat serein	Répartition	Dirigeants et salariés	La Française AM (Oubli Mutual)	Missions étrangères de Paris	Autres	64% du capital entre les mains de 7 associés personnes physiques
Une Gouvernance duale	Conseil de Surveillance Directeur + Comité de Direction	Oliver Flornoy Président du Conseil d'Adm.	Christophe Bouchard Directeur général d'Adm.	Christophe Boursse Directeur Développement	18 collaborateurs dont 7 associés 7 Membres du Conseil, dont 3 indépendants	
Des partenaires locaux	Multi Teneurs de Comptes	France	Belgique & Luxembourg	Suisse	CM DE France, Nations Unies & Co. (France) CIC Swiss BIL, Robeco & Luxembourg BIL Luxembourg	

UN GROUPE INSCRIT DANS LA DURÉE ET FIDÈLE À SES VALEURS

A l'origine....					
1819 Alexandre Robert-Gosselin, banquier à Paris, crée la première charge d'agence de change familiale.	1854 Il fut suivi par Louis Robert-Gosselin, puis par Eugène, François, Marcel.	1962 ... puis par son neveu Yves Flornoy, Directeur de la charge d'agence de change.	2012 Fidèle à sa tradition familiale, FLORNOY & ASSOCIÉS Gestion a été la première fondation au milieu de la gestion de portefeuilles, par une véritable expertise personnelle et des principes éthiques et de transparence.	2015 FLORNOY & ASSOCIÉS Gestion a été la première à acquiescer à la loi de gestion PNBDA, installée à Genève.	2017 FLORNOY & ASSOCIÉS Gestion poursuit son développement européen avec l'ouverture en 2017 de deux succursales, l'une à Marseille, l'autre à Bruxelles.

Word Template

NOM PRÉNOM
 SITUATION DE PORTEFEUILLE - [Date de publication]

FLORNOY & ASSOCIÉS
 GESTION

FLORNOY & ASSOCIÉS
GESTION



Rapport de gestion trimestriel

[Date de publication]

Flornoy & Associés Gestion SAS
 2 Avenue de l'Opéra
 75001 PARIS
 +33 (0) 1 84 16 13 28 | paris@flornoy.com | www.flornoy.com
 Agrément Autorité des Marchés Financiers GP12000007

Les performances passées ne préjugent pas des performances futures. Leur présentation est purement informative et ne constitue ni une offre, ni une sollicitation de souscription. Un relevé de portefeuille détaillé est tenu à votre disposition sur simple demande. Répartition des fonds diversifiés selon dernière répartition connue.

Methodology

- **Design Brief**

Define a clear creative direction based on a reference mood board, align on objectives and timeline, and identify the project owner for deliverable approval.

- **Artistic Direction**

Brainstorming on the creative directions; implementation via a number of design proposals on slides, reviewed by the consultant.

- **Design Adjustment**

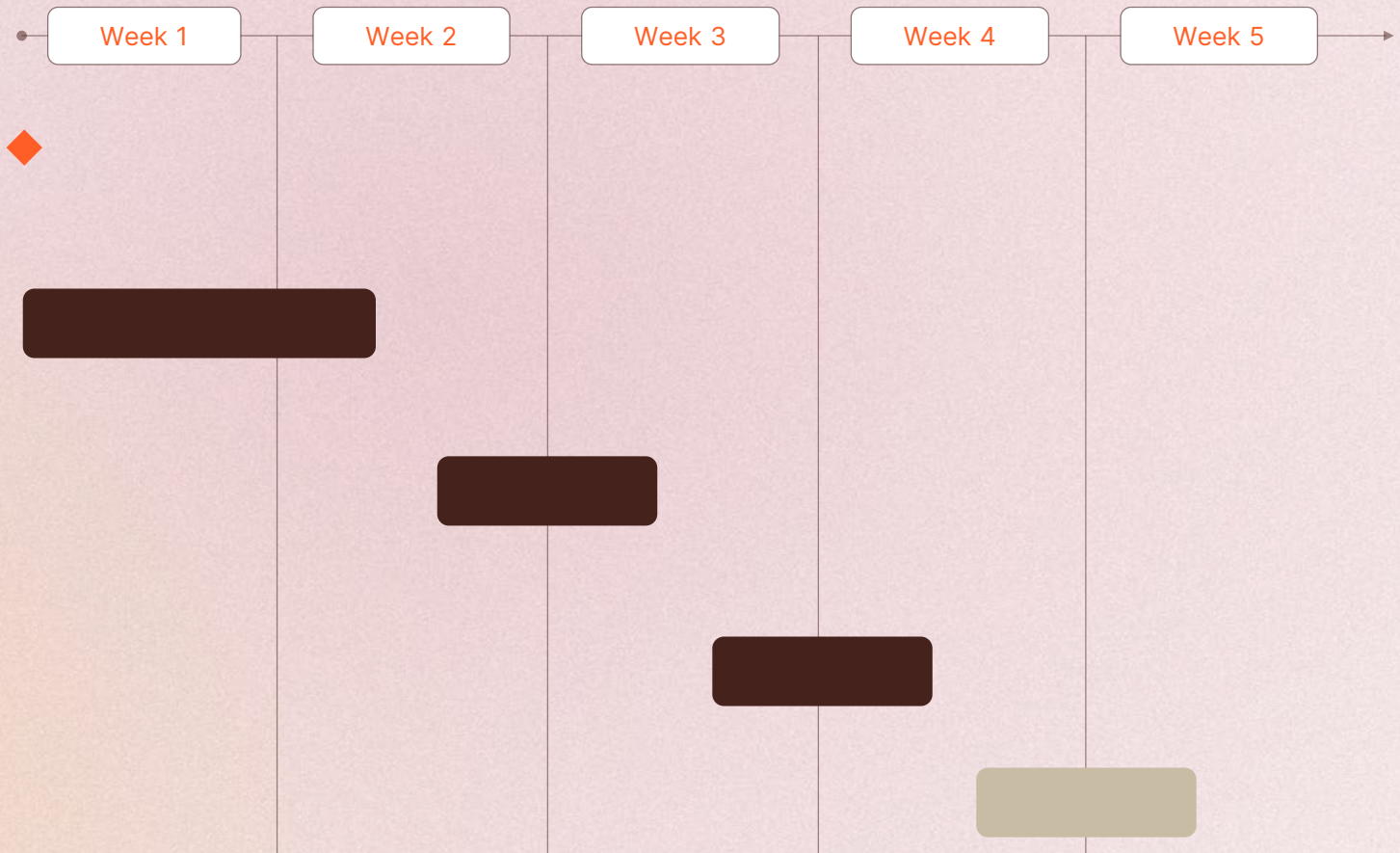
Adjustment and application of the selected creative direction to the entire document.

- **Finalization of the Design and Handover**

After the graphic creations have been validated, the designer will hand over to the consultant to launch the implementation phase.

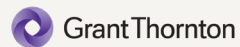
- **Implementation**

Configuration by UpSlide.



Case Studies

Clients who have trusted us with their design work:



Testimonials

“

It was a real pleasure working with UpSlide’s Design team, who fulfilled our expectations in every respect, and even beyond.

A professional, dynamic, highly organized, and efficient team, exactly the way we like it.

Always ready to make suggestions. We won’t think twice about entrusting them with other projects.

[View this project](#)



Aude Josset
Head of Marketing & Com.
Asset Management



“

We appreciated the **availability of the teams and the quality of the discussions** during the creation of our template, both with Amélie on the design side and with Antoine on the UpSlide implementation side.



Christoph Briault
Communication Manager



“

We worked smoothly with the UpSlide team throughout the project. Amélie and her team surpassed themselves to meet our requirements while keeping to the budget and deadlines which, moreover, were sometimes very tight. **It was a pleasure working with them; their expertise went beyond our expectations.**

I strongly recommend them.

[View this project](#)



Joanna Osborne
Head of Marketing





Presentations Designed as an Extension of Your Brand.

Over five years supporting our clients
with an average rating of 4.9/5.

Contact Us

