BERGOS

PRIVATE BANK

PRESS RELEASE

Zurich, 15 July 2026

BERGOS: SUCCESSFUL FIRST HALF OF 2026

Zurich-based Private Bank Bergos looks back on a very successful first half of 2026. Overall, business performance was highly encouraging and underscores the strength of the business model as well as the successful implementation of the bank's strategic direction. Despite a challenging market environment, Bergos further strengthened its market position and generated important growth momentum.

Particularly pleasing was the development of net new money inflows, which reached CHF 462 million as of the end of June. Assets under management (including custody accounts) amounted to CHF 8.7 billion. The continuous expansion of client relationships and share of wallet highlights the confidence clients place in Bergos' advisory expertise and range of services. At the same time, cost development remained disciplined, reflecting the bank's consistent focus on efficiency and sustainable growth. Operating results also developed positively in the first half of the year and were in line with the ambitious targets of the Swiss Private Bank. Dr Peter Schmid, Chairman of the Board of Directors, said: "The very positive business performance confirms the stability of our business model and demonstrates that the consistent implementation of our strategic initiatives, together with our clear focus on our core business, is delivering results."

Numerous initiatives were successfully implemented during the first half of the year. The focus was on the continuous further development of the business model, the optimisation of the client experience, and the targeted realisation of growth and revenue potential. Our aim is to provide our clients with first-class service.

The market environment remained characterised by geopolitical and economic uncertainties during the first half of the year. At the same time, client and wealth structures are evolving, leading to an increasing importance of securities trading activities. Bergos is addressing these developments through active client engagement, in-depth investment expertise and a consistent focus on the long-term needs of its clients. Till C. Budelmann, Chief Investment Officer, added: "Through regular and well-founded assessments of economic and capital market developments, we provide guidance – especially in a challenging market environment."

For the second half of the year, Bergos will continue to pursue its chosen path with consistency. Simon Wanzenried, Head Private Banking, explained: "The focus remains on further developing our core business, implementing growth initiatives and continuously enhancing the client experience." At the same time, the bank will continue to pursue its strategy with a long-term perspective and a steady hand.

BERGOS AG

Bergos AG is an independent, internationally operating Swiss Private Bank focusing on private wealth management. Bergos emerged in 2021 with a new shareholder base from its former mother company, the Berenberg Group founded in 1590, and has been serving international private clients and entrepreneurs in the Swiss financial center for over forty years. Its headquarters are in Zurich with an office in Geneva. The Swiss Private Bank is dedicated to "Human Private Banking" and specializes in wealth management and advisory services. With more than 120 employees, the focus is on providing expert guidance in all known liquid asset classes, as well as in private markets and alternative investments. Bergos AG offers private clients, entrepreneurs and their families a holistic, cross-generational service that focuses on security, neutrality, internationality and openness to the world.

MEDIA CONTACT

BERGOS AG
Kreuzstrasse 5
8008 Zurich, CH

Sarah Thalmann
Head Marketing

communications@bergos.ch
www.bergos.ch