

Media Release

EFG to integrate BlackRock's Aladdin Wealth™ technology into advisory platform

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EFG International is today announcing the integration of the Aladdin Wealth platform—wealth management technology from BlackRock—into its advisory platform. This marks an important step in EFG's multi-year programme to enhance its digital platforms. With Aladdin Wealth, Client Relationship Officers (CROs) and Investment Counsellors (ICs) will have direct access to advanced analytics and risk insights, enabling them to accelerate growth, drive greater efficiency, and deliver personalised service at scale.

Powered by Aladdin Wealth™ technology, EFG will transform its investment management process through a single platform that delivers comprehensive portfolio analytics across the whole portfolio, scenario modelling, risk insights, and proposal generation tools. The solution supports deeper client conversations, sharper investment proposals, and consistent advisory delivery across EFG's global network. EFG's clients will benefit from deeper investment insights, allowing them to navigate complexity and identify new public and private markets opportunities in their portfolios.

Andre Portelli, Global Head of Investment & Client Solutions at EFG: "As a global private bank, our objective is to provide clients with guidance to enable them to make informed investment decisions. With Aladdin Wealth, we are providing our clients, CROs, and ICs with a state-of-the-art investment engine that embeds the relevant information and provides a seamless digital experience, further strengthening EFG's client centricity by allowing our CROs and ICs to deliver truly personalised service and impartial advice."

Zachary Lerner, Head of Aladdin Wealth Tech in EMEA, BlackRock, said, "The wealth management landscape is changing rapidly, driven by clients' demand for deeper relationships, tailored solutions across public and private markets, and greater transparency. As EFG International accelerates its mission to enhance its digital platform, we are excited to rollout the Aladdin Wealth platform's advanced portfolio risk and analytic capabilities."

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About EFG International

EFG International is a global private banking group offering private banking and asset management services and is headquartered in Zurich. EFG International's group of private banking businesses operates in over 40 locations worldwide. Its registered shares (EFGN) are listed on the SIX Swiss Exchange.

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