



CONCORD
ASSET MANAGEMENT

WE ARE DIFFERENT

WHY US



- Amongst top 5 asset management companies
- Number 1 in non bank sector
- Reliable and trustful partner
- Innovative products
- Tailor made solutions for your money

ABOUT US

- Over EUR 68 million assets under management
- Focus on fund management
- A member of the Bulgarian Association of Asset Management Companies

- 15 years on the Bulgarian Capital Market.
- The **first** national mutual fund in Bulgaria registered in the Bulgarian Stock Exchange.

COMPANY FOUNDED

INTRODUCED

“Concord Fund 1 – Stocks and bonds”
balanced profile

2006

2008

ACQUIRED

- “Standard Investment High-performance fund”
- “Standard Investment Balanced fund”
- “Standard Investment International fund”

MANAGED

10 diverse mutual funds

2016

CHANGES

transformation of
“Concord Fund 6: Money market fund” to “Concord Fund 6: Bond”

KEEP THE BRAND
three consecutive merges of funds

THE COMPANY

I N T I M E

2005

REGISTERED

“Concord Fund 2 – Equity”
open-end

LAUNCHED

- “Concord Fund 3 – Real Estate”
- “Concord Fund 4 – Energy”
- “Concord Fund 5 – Central East Europe”
- “Concord Fund 6 – Money Market Fund”

2012

LAUNCHED

“Concord Fund 7 – South-East Europe”
closed-end | listed on the BSE – Sofia
ticker: CODA

2017

2018

- Main focus on fund management
- Large number of mutual funds
- Diversified product range

Strategic asset allocation based on:

- Risk profile
- Sectors - **Real estate** and **Energy**
- Regions
- Currencies, etc.

COMPANY PORTFOLIO

OUR STRATEGY

Meet clients needs

Daily liquidity | Low expenses | Risk diversification

Tailor made solutions and discretionary
management of individual accounts

Investment management solutions for our clients

Individuals | Companies | Institutions

PERSONAL PORTFOLIO MANAGEMENT

MEET THE CLIENT

- Identifying clients needs
- Analyses
- Defining investment horizon

ESTIMATE CLIENT PROFILE

- MiFID II compliant
- Assessment
- GDPR compliant

PERSONAL SOLUTIONS

- Different options
- Alternatives
- Strategies

PROFESSIONAL CARE

- Market monitoring
- Risk management
- Reporting

- Trust
- Flexibility
- Yield
- Solutions for your future
- Transparency



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Natalia Petrova

executive director

(e) petrova@concord-am.bg

(m) +359 889 990 833

CONTACT US

(e) Asset_Management@concord-am.bg

(p) +359 28 16 43 70

(p) +359 28 16 43 45

(a) 117 Todor Alexandrov Blvd, 1303 Sofia, Bulgaria

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