

Press release

Paris, 5 December 2022

Indosuez Wealth Management launches a new digital platform to enable its clients to access the bank's investment universe completely independently

Indosuez Wealth Management is launching a new digital service for its clients who have concluded an advisory agreement. Clients will have access via their e-banking space to a platform presenting a wide range of financial instruments, pooling convictions and recommendations from Indosuez experts. This platform provides a response to clients' new expectations in terms of digital technology and independence.

A new online service to provide direct access to the bank's investment universe...

From their e-banking space, Indosuez clients who have concluded an advisory agreement will now be able to independently access Indosuez's top investment themes, including a focus on the range of responsible products, its experts' convictions and recommendations, market data and detailed product sheets, including ESG ratings. They will also be able to create their own list of products. The new platform provides clients with a tool to filter a wide investment universe that will be constantly updated. Clients holding structured products will be able to benefit from an innovative feature to keep them up to date with the events calendar associated with structured products (payment of coupons, date reminders, etc.).

... and meet new client expectations in terms of digital technology and independence

According to a Capgemini study, 63% of very wealthy clients in Europe want access to market information and to carry out transactions independently¹, a figure that rises to more than 70% in Asia-Pacific. For several years now, Indosuez has been increasing the number of points of contact with its clients, including the choice of accessing banking services electronically or in person. Using this new digital platform, clients will therefore be able to establish their own list of

¹ Capgemini, Wealth Management Top Trends 2022

"favourite" stocks and explore the latest investment themes, before discussing with or obtaining further information from their usual Indosuez advisor. This platform illustrates the bank's belief that digital technology needs to be enhanced by people.

A service designed in agile mode and co-constructed with clients

Originally reserved for bank advisers, this new online service was developed in agile mode in the Indosuez Innovation Lab. Around 20 clients contributed to developing the tool, according to a co-construction approach. All client feedback has been incorporated, thereby enhancing the features offered. Client feedback will continue to feed into the product's development in the months ahead.

Press contacts

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About Indosuez Wealth Management

Indosuez Wealth Management is the global wealth management brand of the Crédit Agricole Group, the 10th largest bank in the world by balance sheet (The Banker 2022).

Shaped by over 145 years' experience of supporting families and entrepreneurs from around the world, Indosuez Wealth Management brings its clients a tailored approach that helps them to preserve and develop their wealth consistent with their aspirations. Its teams take a comprehensive view and provide expert advice and exceptional service, offering a wide range of services for the management of both personal and business assets.

Renowned for its combination of a human scale and a truly international reach, Indosuez Wealth Management has nearly 3'000 employees in 10 regions around the world, in Europe (Belgium, France, Italy, Luxembourg, Monaco, Spain and Switzerland), Asia-Pacific (Hong Kong SAR, New Caledonia and Singapore) and the Middle East (United Arab Emirates).

With €135bn in assets under management (at 31/12/2021), Indosuez Wealth Management is one of the global leaders in Wealth Management.

www.ca-indosuez.com