





## Client-Centric Investment Solutions

**Global Banking & Finance Review spoke with Francisco Brunet, Managing Director of SURA Investment Management & Head of Distribution in Mexico about the challenges and opportunities facing the investment industry and the company's success.**

**Congratulations on your award-winning success. What do you attribute to your success?**

This award is indeed a welcome acknowledgement of the work we have done as a team effort. At SURA Investment Management, we have a top-level team of investment professionals each of whom are specialized in a certain category of assets. This allows us consistency not just with our processes, especially those relating to investments, but also in terms of the values that we uphold at SURA Investment Management, along with the commitment we have made as an Organization with both Mexico and the region in general. Our focus is on providing our clients with better options, supported by well-diversified investment strategies centered on assets with optimal risk/return ratios that create true added value for our clients, as they themselves are quick to recognize.

**What are the biggest challenges and opportunities you see facing the investment industry Mexico?**

The biggest challenges facing the industry today have to do with the competition. There are many world class players that are keenly eyeing the Mexican market, and for some time now we have seen a certain amount of sophistication among investors whose appetite for risk and diversification has increased, which is why we are seeing a great opportunity rather than a challenge. What I mean by that, is that our clients are increasingly looking to asset managers with tried and tested processes who are able to offer the experience they need along with teams of staff with career plans for whom international certifications such as CFA are a 'must'. Also ESG criteria must be firmly embedded in the processes used and the decisions made when choosing where to invest,

creativity and innovation are another key factor for product offerings, and of course, being a 'client centric' investment firm, all of which have been fundamental pillars guiding our framework for action for many years at SURA Investment Management.

### **How are industry and regulatory drivers impacting investments for institutional clients?**

The changes that regulators are introducing to our industry all have a basic purpose and that is for the good of the final investor. These decisions obviously have an impact on us, as asset managers, but as previously mentioned, our clearly-defined processes and our capability to listen attentively to our clients in order to really understand their needs undoubtedly puts us in a privileged position in terms of being able to promptly act on these issues.

On the other hand, and as previously mentioned, we see that our industry is increasingly introducing ESG criteria in the investment decision-making process, especially with regard to institutional clients. SURA Investment Management has just become a PRI signatory and the SURA Business Group, to which we belong, has been included in the Dow Jones Sustainability Index for many years now, so we have long been genuinely committed to the trends affecting our industry.

### **Can you tell us about some of the investment services available?**

Our experience now spans more than 20 years in our industry, as independent asset managers dedicated to the institutional market. This has allowed us to improve upon the products and services we provide the market by making these more sophisticated, offering an excellent variety of debt and equity investment strategies, both on a local and international level, all of which have been consistently placed within the first quartile of their respective categories. In addition to these strategies, we were the first in Mexico to offer a family of funds known as "Ciclos de Vida" (Life Cycles in English) which have a track record of more than 10 years and today are market leaders according to several consultants and specialists

in this field. Without a doubt, life cycle funds are the best vehicles for private contributory pension plans. In addition to the "traditional assets", as we call them, we are working on creating alternate investment products, mainly in the real estate and private debt segments. These are asset classes that we have in other countries and now we are transferring our expertise from one country to another, and certainly these life cycle funds shall prove to be a great investment option for the Mexican market.

### **How does Sura Investment Management support the social economic development of Mexico?**

As previously mentioned, we are PRI signatories and the SURA Business Group to which we belong has long been included in the DOW Jones Sustainability Index, which speaks to the Group's commitment to Mexico and Latin America, a commitment that lies at the very core of our Organization. ESG criteria are becoming increasingly relevant in our decision-making process as investment managers. Furthermore, SURA created the SURA Foundation in Mexico in 2019, which is firmly committed to furthering financial education among the most vulnerable segments of the population. This is certainly an investment in the country's future and one where SURA Investment Management and Grupo SURA are firmly committed to bringing about the inherent benefits.

### **What is your business strategy this year?**

Our strategy this year is focused on consolidating the corporate segment, mainly with respect to private pension plans, and at the same time expanding our Wealth Management and Insurance segment in Mexico. Our mandate is to become a truly client-centric organization in all areas, processes and individuals; to get closer to our clients, to listen to what they say and to maintain the highest standards with which we normally serve them, this coupled with the care and perfection of our investment strategies, our capacity to innovate in terms of vehicles and strategies, all of which shall drive our growth both this year and the years to come.

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**Francisco Brunet**

Managing Director of SURA Investment  
Management & Head of Distribution in Mexico

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