

**Julius Baer Group Ltd (BAER:SWX) - Strategic SWOT and Financial Insights - A 360 Review of Opportunities, Challenges and Risk, Corporate and ESG Strategies, Competitive Intelligence, Financial and Operational KPI's, and Recent Trends**

Company Report | 2025-12-10 | 78 pages | Quintel Research

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**Report description:**

Report Summary

Julius Baer Group Ltd Strategic SWOT Analysis and Financial Insights - A 360 Review of Opportunities, Challenges and Risk, Corporate and ESG Strategies, Competitive Intelligence, and Recent Trends Report is a comprehensive and easily accessible overview of Julius Baer Group Ltd's business operations. It provides a detailed analysis of the company's financial and strategic standing, as well as its position in the industry compared to competitors. The report includes several key features to facilitate decision-making and provide insights into the company's performance.

The report begins with in-depth information about Julius Baer Group Ltd including key insights, business segments, key executives, locations, products and services, historical events, corporate strategy, and management discussions. This section provides a solid foundation for understanding the company's key attributes.

Next, the report assesses Julius Baer Group Ltd's strategic standing through various analyses. The ESG spotlight evaluates the company's environmental, social, and governance performance, providing insights into its sustainability efforts and ethical practices. The SWOT analysis examines the company's internal strengths and weaknesses, as well as external opportunities and threats. Additionally, By integrating these strategic analyses, the report offers a comprehensive understanding of Julius Baer Group Ltd's overall strategic standing and supports informed decision-making and strategic planning.

The report also covers Julius Baer Group Ltd's financial analysis basis of latest income statement, balance sheet, and cash flow statement. Key financial ratios related to profitability, asset turnover, credit, market, and long-term solvency are outlined,

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providing guidance for investment decisions. Furthermore, the report compares Julius Baer Group Ltd's financial parameters with those of its competitors, offering a unique analysis of the competitive landscape. This information helps manage the business environment and improve sales activities by gaining insight into competitors' operations.

Finally, the report includes recent news and deal activities undertaken by Julius Baer Group Ltd enhancing awareness of the company's business trends, growth perspectives, and more.

## Key Highlights

Julius Baer is a leading Swiss wealth management group whose origins date back to 1890 when founder Julius Baer established the business on Zurich's Bahnhofstrasse. Today the Group is headquartered in Zurich and has evolved from a local family firm into a global franchise while maintaining its identity as a pure play wealth manager. Over more than a century it has expanded from its Swiss roots into major financial centers across Europe Asia the Middle East and Latin America supported by representative offices advisory centers and booking hubs worldwide. The Group operates through a focused wealth management model centered on discretionary and advisory portfolio management investment solutions lending wealth planning and specialist services. Its strategic cycle for 2023 to 2025 emphasizes focus scale and innovation aiming to deliver high quality revenue growth and improved efficiency. Adjusted net profit reached CHF 1115 billion supported by balanced revenue streams and disciplined cost management. With its long heritage international footprint and commitment to innovation Julius Baer continues to position itself as a global reference in high end wealth management.

## Julius Baer Group Ltd in the News:-

2025-07-14 - Julius Baer publishes Global Wealth and Lifestyle Report 2025

2025-06-30 - Antonia Murga appointed Market Head Latin America

2025-05-20 - Interim Management Statement for the first four months of 2025

2025-04-10 - Annual General Meeting 2025 of Julius Baer Group Ltd

2025-01-27 - Julius Baer Group announces change of Chair of the Board of Directors

## Scope

- Tactical Analysis:- Various strategic frameworks to gain insights into a Julius Baer Group Ltd's competitive position and operational environment. These analytical tools assist in identifying competitive advantages, potential risks, and areas for improvement and efficiency, enabling companies to make informed tactical decisions.
- Business Strategy:- Contributes to shaping the Julius Baer Group Ltd's overall direction, goals, and decision-making processes, ensuring long-term success and alignment with stakeholder expectations.
- Financial Position:- Provide valuable information on the financial performance and investor sentiment surrounding the company. Indicating the level of confidence and expectations in the company's future prospects. These components collectively contribute to understanding the financial health and market perception of the company.
- Company Fundamentals:- These fundamentals offer valuable insights into the company's history, operations, leadership, and geographical presence, aiding in a comprehensive understanding of the organization.
- Competitive Landscape:- An identification of the Julius Baer Group Ltd's main competitors, providing insights into the competitive landscape it operates in.

## Reasons to Buy

- Comprehensive Understanding of the Julius Baer Group Ltd's internal and external factors through SWOT analysis, Financial

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Analysis, and Competitors Benchmarking.

- Strive Strategic Decision Making with various analyses and identifying potential customers and suppliers.
- Mitigate Risk with help of thorough analysis of internal and external factors. Furthermore, develop strategies and contingency plans to address these challenges and minimize their impact on business operations.
- Competitive Benchmarking will help to gain a competitive advantage by understanding industry trends, customer preferences, and best practices.
- Financial Performance Evaluation provides crucial insights into key financial ratios and trends, supporting better financial decision-making and resource allocation.
- Valuable insights from the report enable investors and partners to make informed decisions regarding potential Collaborations, Investments, or Partnerships with the company.

Additionally, available deep-dive analysis on the company Julius Baer Group Ltd:

- Julius Baer Group Ltd PESTLE Analysis
- Julius Baer Group Ltd Value Chain Analysis
- Julius Baer Group Ltd Porter's Five Forces Analysis
- Julius Baer Group Ltd VRIO Analysis
- Julius Baer Group Ltd BCG Analysis
- Julius Baer Group Ltd Segmentation, Targeting and Positioning (STP) Analysis
- Julius Baer Group Ltd Ansoff Matrix Analysis

## **Table of Contents:**

Table of Contents	2
Tables	6
Charts	7
Julius Baer Group Ltd - Key Company Facts	8
Julius Baer Group Ltd - Company Description	9
Julius Baer Group Ltd - Top Executives	10
Julius Baer Group Ltd- Head Office & Locations	11
Head Office - Country	11
Julius Baer Group Ltd - Products and Services	12
Products	12
Services	13
Julius Baer Group Ltd - Company's Mission and Vision	14
Mission	14
Julius Baer Group Ltd - Corporate Strategy	15
Julius Baer Group Ltd - Business Description	18
Investment & Wealth Management Solutions	18
Julius Baer Group Ltd - ESG Spotlight	20
Environment	20
Social	21
Corporate Governance	22
Julius Baer Group Ltd - SWOT Analysis	23
Overview	23
Strengths	25
Weaknesses	27
Opportunities	29

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Threats	31
Julius Baer Group Ltd - Financial Deep Dive	33
Share Price Trend - Jan-2024to Dec-2025 (Average Share Closing Price)	33
Profit and Loss Statement	35
Summary of Profit and Loss Statement	35
Balance Sheet	37
Summary of Balance Sheet	37
Cash Flow Statement	39
Summary of Cash Flow Statement	39
Key Financial Ratio Analysis	41
Julius Baer Group Ltd - Ratio Charts	42
Activity Ratio Charts	42
Growth Ratios Charts	43
Leverage Ratio Charts	44
Liquidity Ratio Charts	45
Profitability Ratio Charts	46
Competing Players	47
Snapshot of Competing Players	48
Credit Suisse Group AG	48
Key Company Facts	48
Company Description	48
Snapshot of Competing Players	49
EFG International AG	49
Key Company Facts	49
Company Description	49
Snapshot of Competing Players	50
Union Bancaire Privee Private Clients	50
Key Company Facts	50
Company Description	50
Snapshot of Competing Players	51
Pictet & Cie Group SCA	51
Key Company Facts	51
Company Description	51
Snapshot of Competing Players	52
Vontobel Private Banking	52
Key Company Facts	52
Company Description	52
Julius Baer Group Ltd - In the News	53
14-Jul-2025 -Julius Baer publishes Global Wealth and Lifestyle Report 2025	53
30-Jun-2025 -Antonia Murga appointed Market Head Latin America	54
20-May-2025 -Interim Management Statement for the first four months of 2025	55
10-Apr-2025 -Annual General Meeting 2025 of Julius Baer Group Ltd	57
27-Jan-2025 -Julius Baer Group announces change of Chair of the Board of Directors	57
21-Nov-2024 -Interim Management Statement for the first ten months of 2024	59
21-Nov-2024 -Interim Management Statement for the first ten months of 2024	60
15-Aug-2024 -Reto Calonder to become Head of the St. Gallen branch and the Eastern Switzerland region of Julius Baer	60
11-Apr-2024 -Annual General Meeting 2024 of Julius Baer Group Ltd	62

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18-Mar-2024 -Publication of Annual Report 2023, Sustainability Report 2023, Business Review 2023; update on climate strategy	
62	
Julius Baer Group Ltd- Key Deals	64
11-Jun-2025 - Julius Baer successfully places EUR 500 million senior unsecured notes	64
10-Jun-2025 - Julius Baer Group Ltd. to redeem Perpetual Tier 1 Subordinated Bonds issued 25 June 2019 on first call date	64
28-Mar-2025 - Sale of domestic Brazilian business successfully completed	65
18-Mar-2025 - Julius Baer to enter Italian onshore market	65
11-Feb-2025 - Julius Baer Group Ltd. places USD Perpetual Tier 1 Subordinated Bonds	65
07-Jan-2025 - Julius Baer to sell its domestic Brazilian business to BTG Pactual	66
05-Sep-2024 - Julius Baer renames subsidiary Kuoni Mueller & Partner to Julius Baer Real Estate Ltd. and acquires all of its shares	67
05-Sep-2024 - Julius Baer successfully places EUR 500 million senior unsecured notes	67
09-Aug-2024 - Julius Baer Group Ltd. to redeem Perpetual Tier 1 Subordinated Bonds issued 12 September 2017 on first call date	68
02-May-2024 - Sale of Kairos to Anima successfully completed	68
19-Mar-2024 - Julius Baer successfully places CHF 460 million domestic senior unsecured bonds	69
Appendix	70
Definitions	70
SWOT Analysis	70
PESTLE Analysis	70
Value Chain Analysis	70
ESG Spotlight	70
Financial Deep Dive	70
Financial Ratios -	71
Activity Ratios	71
Growth Ratios	72
Leverage Ratios	73
Liquidity Ratios	74
Market Ratios	75
Profitability Ratios	75
Research Methodology	76
Disclaimer	77
Contact Us	77

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