Why Quercus

Independence and a well-motivated team

Quercus TFI S.A. belongs to a group of independent providers of investment funds. Such entities, which have been well-established in developed markets for a long time, are just starting operations in Poland. The company was established by a group of experienced professionals. Its key employees are the main shareholders of Quercus TFI S.A. That is why our team is perfectly motivated to effectively manage the assets invested by our clients.

Non-standard strategies

We create unique investment funds which are different from those usually available on the Polish investment fund market. When drafting new product concepts we take into account their potential for above-average profits exceeding the returns offered by traditional strategies, or for optimization of expected rate of return in relation to risk.

Fees related to investment performance

We make sure that the structure of fees and charges allows Investors to jointly and effectively enjoy the benefits of our co-operation. Unlike most funds offered in Poland, management fees in QUERCUS subfunds are closely connected with the performance generated by our investments. Therefore, we care even more about delivering high and stable returns.

Also for the most demanding clients

The offer of Quercus TFI S.A. meets requirements of both individual and corporate clients. When substantial assets are involved, we recommend our asset management and investment advisory services, where the fees are also strictly related to the investment results achieved. We offer custom-designed closed-end investment funds for our most demanding clients.

Investing based on robust fundamentals and scientific achievements

Our investment philosophy is mainly built on making decisions based on a fundamental analysis. We invest in instruments we feel comfortable with, considering our experience and knowledge. For equities we prefer well-managed companies, usually operating in service sectors. We see great opportunities hidden in emerging markets. Our investment policy is well-supported by the latest achievements of Polish and international scientists and researchers.

Solid partner

Since 2008, almost 36 thousands affluent Clients have put their trust in us. By the end of 2021 PLN 4.4 b worth of assets had been placed in our funds. The most popular subfunds among our Clients were QUERCUS Capital Protection, QUERCUS Short Duration, QUERCUS Global Balanced and QUERCUS Aggressive, mostly for their excellent investment results.

Summing up, our offer is aimed at a strictly defined target group, i.e. high net-worth and ultra high net-worth Investors. Our main goal is the effective increase in Clients' assets. Since we have invested our own assets in QUERCUS funds, and all key personnel of our Company are also shareholders of the Company, we are strongly motivated and determined to reach our goal.

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