

MARKUS TÖLLKE



Personal Data

Name : Markus Töllke, German, born 1968, married, 3 children
Vocational Training 1988-1991 : Commerzbank AG, apprenticeship in banking
University 1992-1997 : University of Cologne, Dipl. Kfm. („MBA“),
Diploma: „Portfolio Management with Stock Index Futures“
Graduation „cum laude“

Business Career

1997-2002 : Delbrück & Co, - Private Bankers since 1712 -, Cologne
Portfolio Manager (Multi Asset Class)
Advisor for some UHNWI clients

2002-2005 : Merck Finck & Co, - Private Bankers -, Munich
Head of Portfolio Management

2005-2007 : Merck Finck Invest Asset Management GmbH, Munich
Head of Portfolio Management
Deputy-Head of Asset Management

2008-2010 : FIDUKA-Depotverwaltung GmbH, Munich
CEO & CIO

- Investment Strategy (Asset Allocation)
- Portfolio & Fund Management
- Research (Stocks, Bonds, Funds)
- Global EMA Equity Fund (Morningstar *****)
- Global Major Markets Equity Fund (Morningstar *****)
- European Equity Fund (Morningstar ***)
- Global Corporate Bond Fund (Morningstar *****)

2010- : More Value AG, Freienbach (CH)
Founder and Shareholder

- Equity (pre) selection based on a quantitative methodology

2011-2014 : Investas AG, Berne
(FINMA regulated Asset Manager)
Head of Fund Management & CIO

- Investment Strategy (Asset Allocation)
- Selection of Active Investment Funds
- Two Multi Asset Class Pension Funds
(Valitas Diversified Funds 3.0 & 5.0, AuM: CHF 500 Mio.)

2014- : MRB Vermögensverwaltungs AG, Zurich
(FINMA regulated Asset Manager)
CEO, Member of the Supervisory Board, Shareholder

- MRB Wandelobligationen Fund
- Protea - MRB Convertible Bonds Fund
- MRB High Yield Bond Fund
- MRB Globaler Value und Dividenden Fund
- MRB Goldminen- und Rohstoffaktien Fund