

Julius Bär

BOOSTING THE VALUE OF CLOUD VIA CULTURE CHANGE

Tech Revolution Summit 2023

9 November 2023

BÄR • SINCE 1890



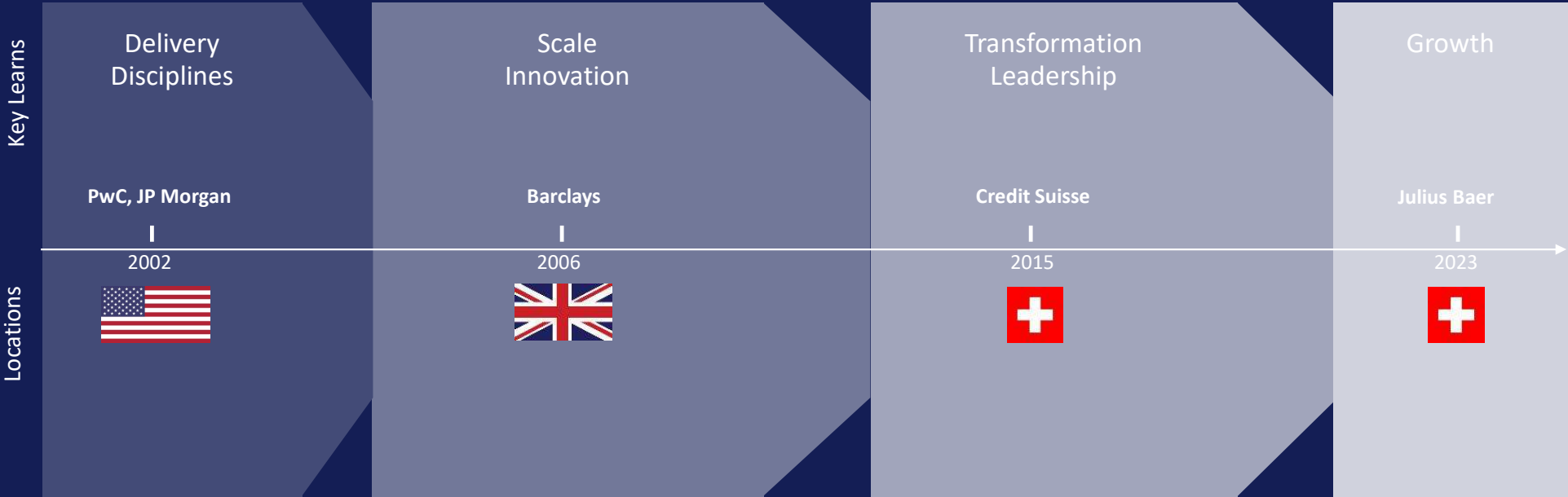
JULIUS BÄR



Agenda

- 1 Background
- 2 Challenges
- 3 Opportunities
- 4 Demo
- 5 Key Learns
- 6 Q&A

About me



Who we are

Julius Baer is the leading Swiss wealth management group.

Our holistic and tailored offerings take into account the needs of each valued client along their life cycle.

Our aim is to create long-term partnerships powered by high-end services, expertise, an open architecture, and access to a network of like-minded people.



What we stand for

Solid foundations

- A solid history in Swiss banking dating back to 1890
- From family heritage to a transparent, listed company
- Strong balance sheet and capitalisation
- A long history of profitability

Personal connections

- A personal relationship manager located in close proximity to you and supported by a team of specialists
- Advice tailored to your aspirations
- Long-lasting client relationships across generations
- Accessible and approachable management

International network

- Local proximity complemented by international centers of expertise
- Present in over 25 countries with more than 60 locations
- Seven booking centers worldwide
- Partnerships with experts for complementary services

Pure wealth management

- Exclusive strategic focus on wealth management
- Holistic offering: wealth planning, investing, and financing
- Comprehensive investment solutions built on our expertise
- Proprietary research with a global perspective

2022 results (in CHF)

424 billion

Assets under management

106 billion

Total assets

6.3 billion

Total equity

950 billion

Net profit

14.0%

BIS CET1 capital ratio

Aa3

Moody's long-term deposit rating

How we approach transformation

Creating value beyond wealth – agile, the Julius Baer way



What is DevCloud?



Great Place to Work

- Integrated Dev Portal
- Unique for Swiss Banks
- Attracts Engineering Talent



Bank for the Buck

- Modern software development processes
- Improved Ways of Working



Agile Transformation Enabler

- Transition from Products to self-built Software
- DevOps Tools

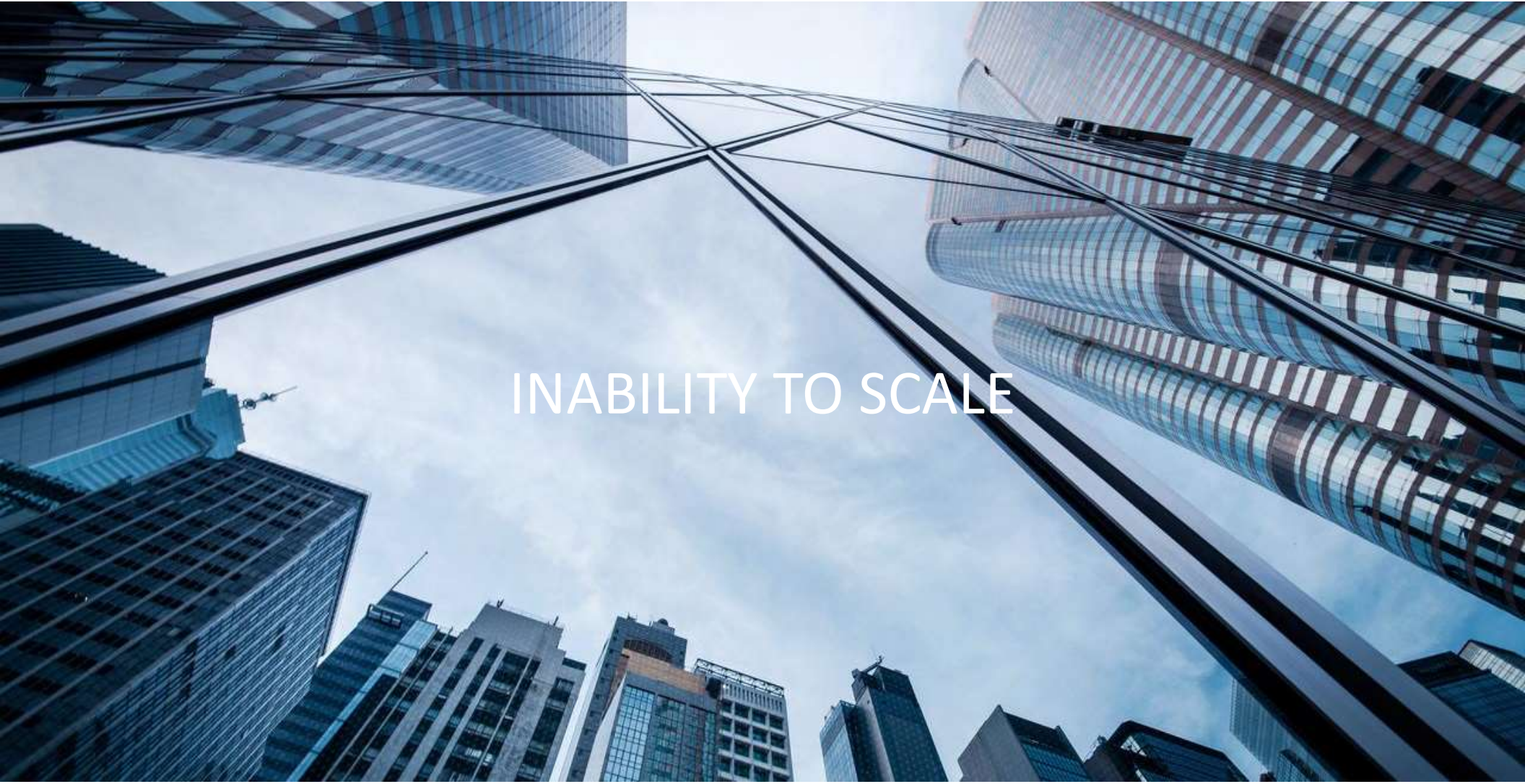
CHALLENGES



LACK OF TRANSPARENCY



UNCLEAR OWNERSHIP



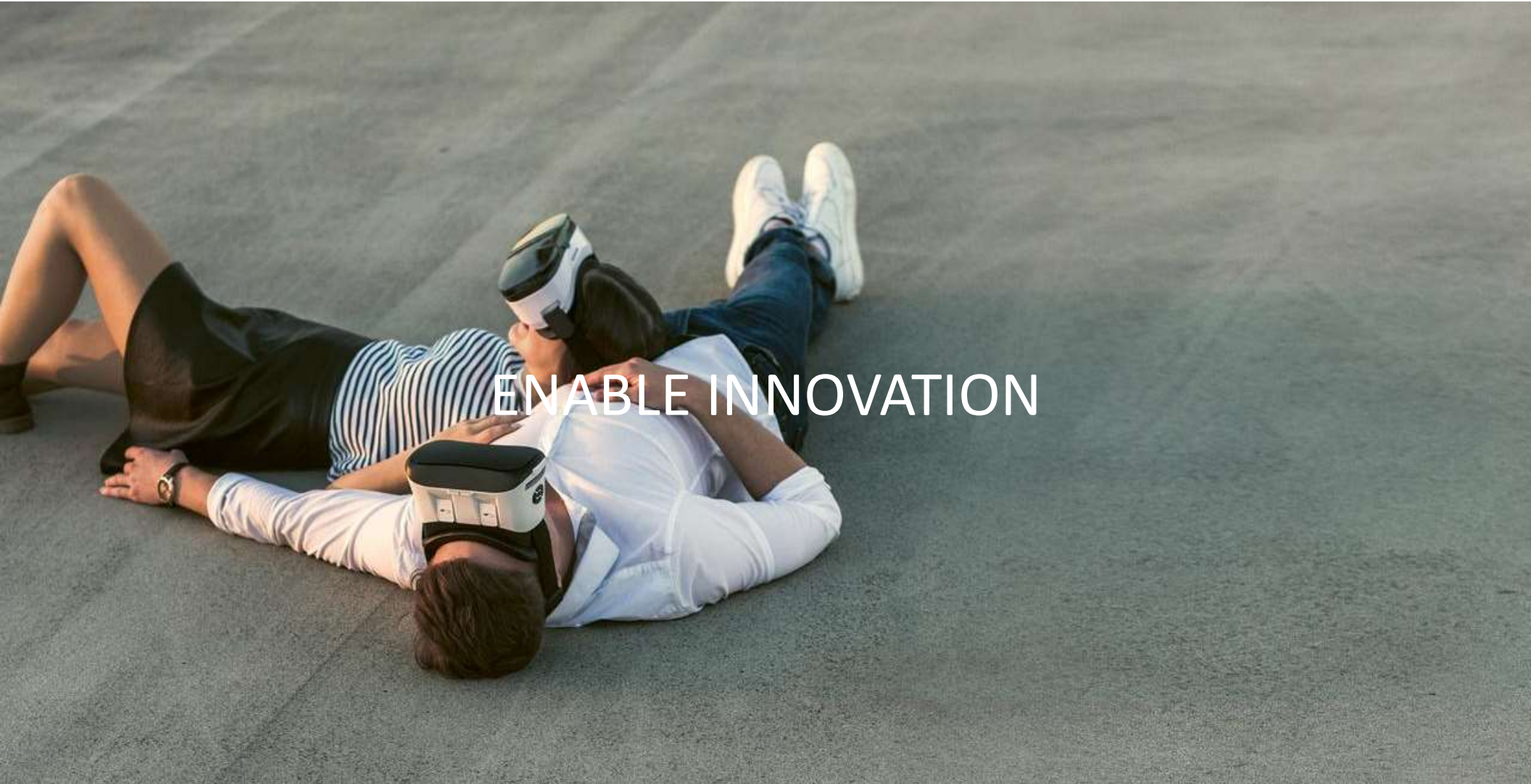
INABILITY TO SCALE

OPPORTUNITIES



An aerial photograph of a winding asphalt road that curves through a dense forest. The trees are in various stages of autumn, with some showing bright yellow and orange leaves, while others are still green. The road is dark grey with white lane markings. The overall scene is captured from a high angle, looking down on the road and the surrounding woods.

DRIVE ACCOUNTABILITY



ENABLE INNOVATION



DEMO

Key Learns



Cultural over Technical

- Team collaboration paramount
- Knowledge exchange
- E2E Transparency



Increase Value

- Engineers improve client awareness
- Own Change and Run
- Clear Accountabilities



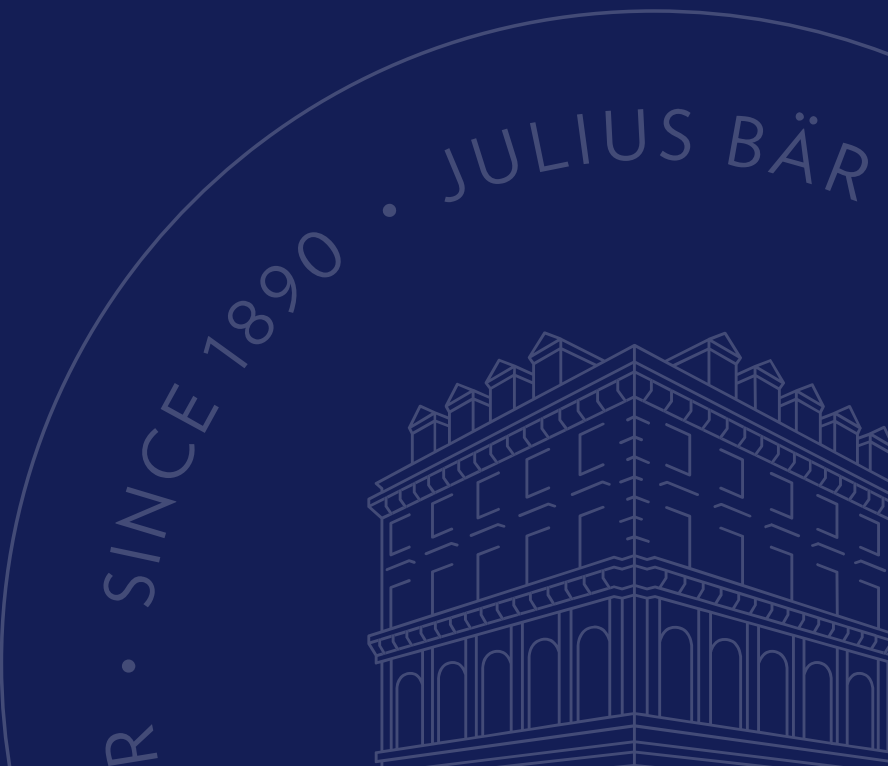
Challenge Status Quo

- Speak-up culture
- Automation
- Great place to work

Contact Details



Darryl Isip
Managing Director Senior Advisor
Head Channels IT / Release Train Engineer
T +41 (0) 588 87 64 63
darryl.isip@juliusbaer.com





JULIUS BÄR GROUP

Head Office

Bahnhofstrasse 36
P.O. Box
8010 Zurich Switzerland
Telephone +41 (0) 58 888 1111
Fax +41 (0) 58 888 1122
www.juliusbaer.com

