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**EUROMONEY**  
**PRIVATE BANKING**  
**AWARDS 2026**

## Best Chief Investment Office

The **private bank** chief investment office at a global, regional and country/territory level that has excelled in delivering the investment frameworks, research-driven asset allocation and portfolio management across asset classes, and sophisticated risk-budgeting that has helped achieve risk-adjusted outperformance for clients. The successful applicant should be able to demonstrate rigorous analytical capabilities, robust portfolio construction, and an efficient approach for translating ideas into actionable investment products.

**Geographic Levels Awarded at:** Global, regional and country/territory

**Eligible Entrants:** Private banks or wealth managers

**Key Performance Indicators:**

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Relative return of Strategic Asset Allocation versus benchmark
- Alpha added by Tactical Asset Allocation

**Assessment Criteria:**

- Evidence of risk-adjusted outperformance of CIO portfolio
- Evidence of successful CIO-aligned products and solutions across asset classes
- Evidence and examples of high-quality research produced by CIO

- Evidence and examples of ESG and sustainability integration
- Evidence of sophisticated integration of digital channels into CIO function

- Select the category you wish to submit for and provide basic information about your entry here.
- You may make entries at a country/territory, regional and a global level.
- You may make separate submissions for all countries and regions where your bank has a physical presence.

## Guidelines

- If you have any questions about the entry process, or research methodology or criteria, please refer to our [research guidelines](#)

## Contacts

- For all queries related to participation, please contact [Alex Pang](#)
- For any questions about the awards research, please contact [Ben Naylor](#)
- For any commercial enquiries, please contact [Peter York](#)

Name of nominee (company or individual)

Geography

  
Global  
Regional  
National

How did you hear about Euromoney's Private Banking Awards? (optional)

  
Social media  
Marketing Communications  
Euromoney Contact/Referral  
Organic (Google, Website, etc.)  
Other (please specify)

## Your Entry

- This entry form is your opportunity to showcase your institution's achievements within the review period (**1 July 2024 to 30 June 2025**).
- In each entry form, there are required financial metrics for your business and the category in addition to qualitative text boxes. All of these align to the criteria Euromoney will use to evaluate entrants and are crucial to our research process.

- Entrants must validate with evidence any improvements their business has made in terms of operations and products during the period under review. Such evidence includes key metrics related to their business (such as assets under management, net new assets and revenues), as well as key metrics applicable to specific categories (such as penetration rates of product lines and trading volumes of investments).
- Entrants may also attach supporting documentation for their submissions.  
The scoring frameworks used by Euromoney's research team use a matrix that awards more points to those entries that provide the data we have requested.

## Financial Metrics

- Please provide all requested data within the prescribed timeframe and currency (where applicable). **Data provided should be relevant to the geographic region in which you are submitting i.e. your institution's global AUM if you are submitting for a global award, or regional AUM if you are submitting for a regional award.**
- Euromoney will use this data to benchmark your business against its peers.
- Euromoney will assess your performance based on growth and outright scale of the key metrics you provide. An entrant's strategy will be taken into consideration when evaluating these metrics.
- **Assets Under Management (AUM):** Total market value of actively-managed client assets, excluding assets under custody or administration.
- **Revenue:** Total income generated from management and advisory fees, transaction commissions, loan spreads and fees from other private banking services.
- **Net New Assets (NNA):** Total client money inflows minus withdrawals, and excluding market performance.
- **Return on Assets (ROA):** Annual net income divided by AUM and expressed in basis points.
- **Cost-To-Income Ratio:** Total operating expenses divided by total operating income, and expressed as a percentage.
- **HNW assets:** Total AUM derived from those clients classified as high-net-worth.
- **UHNW+ assets:** Total AUM derived from those clients classified as ultra-high-net-worth.
- **RM Headcount:** Number of relationship managers, or equivalent role.
- **RM-To-Client Ratio:** Average number of clients assigned to each relationship manager, or equivalent role.

Performance metrics specific to category and geography of award (optional)

	H1 2024	End 2024	H1 2025
1	AUM (USD, bn)		
2	Net New Money (USD, bn)		
3	Revenue (USD, bn)		
4	HNW client assets (USD, bn)		
5	UHNW+ client assets (USD, bn)		
6	Number of active client accounts		

Please provide all data indicated below within the prescribed timeframe and currency (where applicable).

Euromoney will use this data to benchmark your business against its peers.

Euromoney will assess performance based on growth and outright scale. Entrants' strategy will be taken into consideration when evaluating these metrics.

If the data is confidential, please indicate this in the relevant cell.

If you would prefer to share these metrics in a table, please upload it as an attachment in the relevant place in the portal.

Category metrics (optional)

	Performance metric	H1 2024	End 2024	H1 2025
1	Relative Return of Strategic Asset Allocation Versus Benchmark			
2	Alpha added in bps of Tactical Asset Allocation			

Please provide all data indicated below within the prescribed timeframe and currency (where applicable).

Euromoney will use this data to benchmark your business against its peers.

Euromoney will assess performance based on growth and outright scale. Entrants' strategy will be taken into consideration when evaluating these metrics.

If the data is confidential, please indicate this in the relevant cell.

If you would prefer to share these metrics in a table, please upload it as an attachment in the relevant place in the portal.

**Products and Solutions:** (optional)

Products and Solutions: Provide evidence and examples of how you offered a comprehensive chief investment office (CIO) and research platform during the period under awards review.

**Performance:** (optional)

Performance: Provide evidence of how you delivered risk-adjusted outperformance on key Strategic and Tactical Asset Allocation offerings during the period under awards review.

**ESG and Sustainability:** (optional)

ESG and Sustainability: Provide evidence of how you successfully integrated ESG and sustainability processes into your funds offering during the period under awards review.

**Innovation:** (optional)

Innovation: Provide evidence of how you harnessed innovation and digital technology to improve the CIO offering during the period under awards review.

Entrants should aim to provide supporting documentation – such as strategy decks, performance reports, investor presentations, data tables and charts, and qualitative overviews – to support their claims and illustrate their growth and performance over the review period. All data should be dated.

Entries can include confidential information that we can use to justify the granting of an award. Anything clearly marked confidential will not be used outside of decision-making. Euromoney may use information not marked confidential in awards write-ups or research reports.

We accept Word, PDF, Excel and PowerPoint documents.