



BIG DECISIONS BASED ON EXPERIENCE

SMART SAVING WITH AN ESTABLISHED AND TRUSTED PARTNER



ESALIENS.
22 YEARS
OF MARKET
EXPERIENCE

ESALIENS

EXPERT IN
MANAGING
PENSION
PLANS

Esaliens TFI SA has been operating on the Polish capital market since 1998.

Originally, the company operated as Towarzystwo Funduszy Inwestycyjnych Banku Handlowego SA, and from 2006 to 2017 as Legg Mason TFI SA. Now, using the experience and best practices we have gathered and developed over 20 years, we combine the flexibility, efficiency and ethics of a private firm with the operational security typical of large multinational corporations.

A key part of our business is managing pension schemes for corporate clients. We are among the leaders in this field, having offered statutory pension schemes from the very moment they were introduced in Poland.

S M O O T H I M P L E M E N T A T I O N C O M M I T M E N T I N D I V I D U A L A P P R O A C H

OUR VALUES



CONSISTENCY

For years we have been **ensuring stability** of the assets our clients entrust us with.



BUSINESS ETHICS

We choose **solutions that offer value** to our clients.



CLEAR RULES

Contrary to many companies, we focus on **long-term, thoughtful strategies** rather than momentary investment trends.

POSITION ON THE MARKET



OF MARKET SHARE*

We are the largest non-state owned provider of Employee Pension Schemes with an investment fund in Poland.



ASSETS MANAGED**

Including PLN 3.2 billion for our clients' retirement goals.



SUCCESSFUL IMPLEMENTATIONS

Our team has implemented and is operating numerous savings and pension programmes for companies of different sizes – from **capital groups of several thousand employees**, through employers with **several hundred people** to small enterprises of **fewer than a hundred workers**.



UNIQUE MANAGEMENT STRATEGY

In asset management, we are guided
by **in-depth quality analysis**
of our investments.



FOCUS ON SAFETY

We **steer clear** of excessive **risk**.



INDIVIDUAL APPROACH

We **respect the specific needs**
of our investors, contractors
and partners.



WE ARE BOTH A PARTNER AND ADVISOR

- of compensation, benefit and HR teams,
- of strategic sector companies (e.g. pharma, finance, energy, aerospace industry).



WE MANAGE THE OLDEST

Employee Pension Scheme in Poland
(since 1999).



BUSINESS RELATIONS WITH LEGG MASON, INC.

- one of the biggest *asset management*
companies worldwide.

* Source: Polish Financial Supervision Authority's report "Pracownicze Programy Emerytalne w 2018 roku" (Employee Pension Schemes in 2018), updated on 7 August 2019. The indicated market share includes PPE in the form of contracts with investment funds.

**As at 31.01.2021

WHAT CAN WE OFFER TO EMPLOYERS?



OVER 20 YEARS OF EXPERIENCE

In implementation, administration and operation of group pension plans (PPE, PPO*).



MAXIMUM FACILITATION

We develop a comprehensive process for both the employer and employees, from in-depth analysis of needs and solution concepts to processing of participants' declarations and day-to-day service.



EXCELLENT EXPERTISE

Our competent, well-established staff ensures expert service on every stage of the pension plan implementation process. Every member of our team can boast years of experience working with corporate management boards, HR divisions, and financial and operations departments.



LEGAL SUPPORT

We draw up the legally required documentation free of charge.



OPERATIONAL SAFETY

Esaliens TFI meets stringent security requirements, which allows us to enjoy lasting and successful relationships with high-end multinational corporations, particularly from the financial sector.



USER-FRIENDLY APP

For HR divisions to handle PPK.

OUR CLIENTS INCLUDE

Accord Healthcare Polska Sp. z o. o.

Aspen Polska Sp. z o. o.

BNY Mellon (Poland) Sp. z o. o.

Citibank Europe Plc Oddział w Polsce

Spółki z grupy IKEA

Roche Group companies in Poland

MasterCard Europe S.A. Oddział w Polsce

Mastercard Payment Transaction Services S.A.

Pratt & Whitney Rzeszów SA

PZL Mielec Sp. z o. o.

Tauron Dystrybucja SA

Tauron Wytwarzanie SA

UPS Polska

Węgllokoks SA

* PPE – Employee Pension Scheme, PPO – Employee Savings Scheme

WE ARE AT YOUR SERVICE!

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 [linkedin.com](https://www.linkedin.com)
 fb.com/Esaliens
 youtube.com

The logo for ESALIENS, with the letters in blue and a stylized yellow and red graphic element integrated into the 'A'.

IMPORTANT – PLEASE READ CAREFULLY

This document is a business communication and serves as an illustration rather than a forecast. It is not intended for private customers and it is not an offer within the meaning of the Civil Code, nor a public offering within the meaning of the Act on Public Offering, Conditions Governing the Introduction of Financial Instruments to Organized Trading and Public Companies, nor investment advice, other advice, a recommendation to enter in a purchase or sale transaction for any financial instrument, or other information recommending or suggesting investment strategies. ESALIENS TFI SA operates pursuant to the decision of 18 June 1998 issued by the Polish Securities and Exchange Commission.

March 2021