VITRAL

ADVISORS

V

WE AIM TO THINK

DIFFERENTLY ON HOW

INVESTING

IS CARRIED OUT, BY IMPLEMENTING
OVERWHELMING TASKS INTO SIMPLE AND STREAMLINED IDEAS

FOCUSED ON GENERATING RISK ADJUSTED RETURNS AND CAPITAL PRESERVATION

Founded in 2018, we are an independent asset manager and investment advisory shop, providing high-net-worth families and entrepreneurs with a unique approach to asset management and financial planning.

Our firm is the result of a union of efforts of professionals with more than 40 years of experience in the capital markets and investment banking sector.

Uniqueness in our portfolio management practice is characterized by our systematic and quantitative models. This is how we assist clients in managing their assets and aim to generate consistent asymmetric performances and mitigate unnecessary risks.

THE POWER OF INVESMENT

CAPITAL MARKETS HAVE REWARDED LONG-TERM INVESTORS

Growth of a hypothetical $1,000 investment in each Benchmark, from January 1979 to May 2018

U.S. SMALL CAP

U.S. LARGE CAP

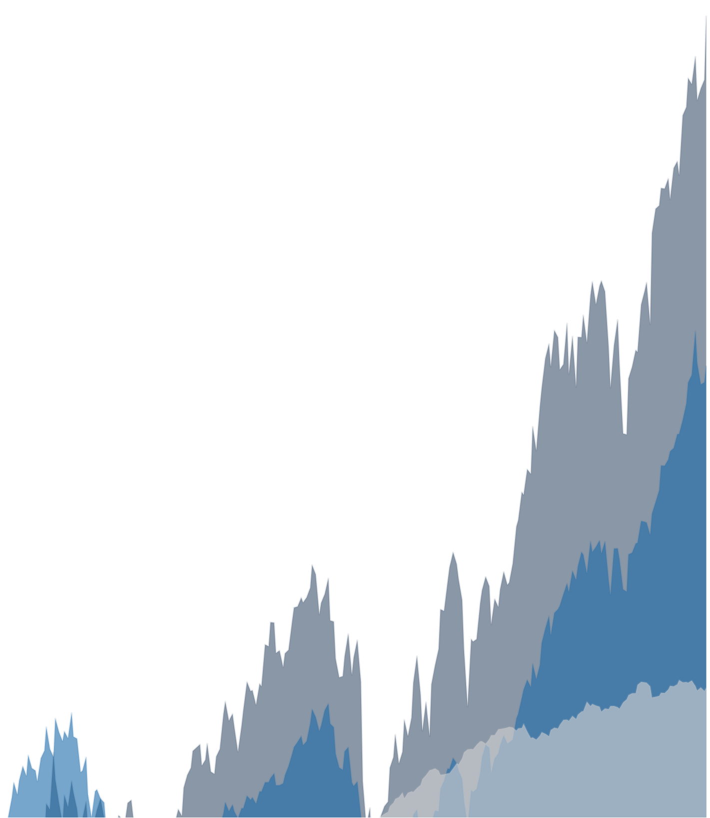
SHORT-TERM GOVERMENT BONDS

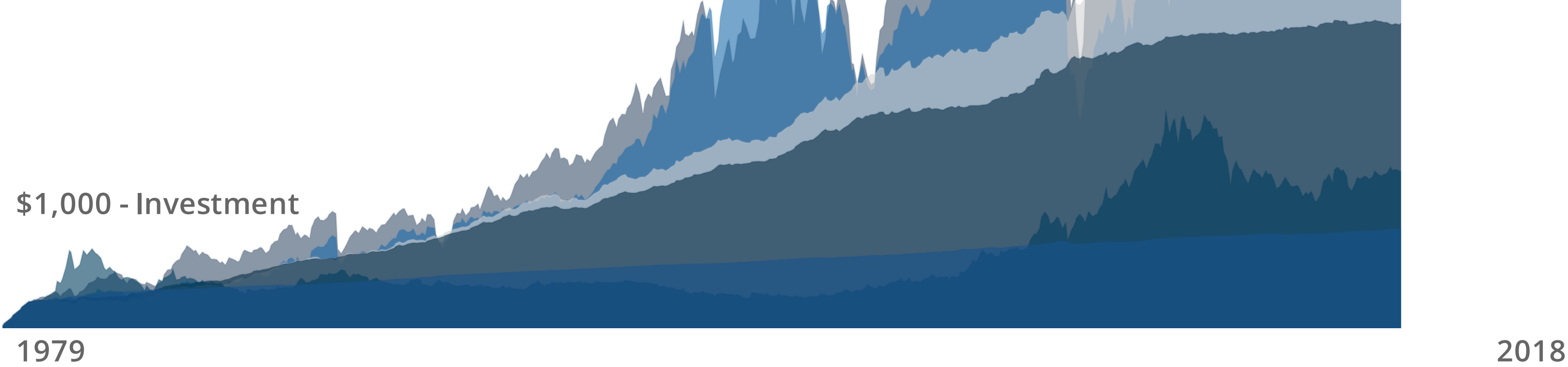
U.S. INVESTMENT-GRADE BONDS

GOLD

U.S. INFLATION

I





RATIONALE

We know how important it is for clients to have a professional, unbiased and trusted advisor who can develop opportunities and implement effective solutions over the course of an investment cycle.

OUR ADVANTAGE

OUR CLIENTS AFFIRM THAT WE ARE DIFFERENT

Delivering innovative investment solutions, strategies and expertise.

Institutional-caliber allocation designs, portfolio architecture and risk management techniques.

We are paid only by our clients, removing any kind of conflict of interest.

Transparent fee structure, which aligns the firm’s incentives with the investor’s interest.

Independence and freedom from any bank, broker dealer and third-party research.

Give our clients access to a broad selection of products and investments via the network we have developed.

INEFFICIENCY
VALIDATION

1

2

3

4

Meet the team

CARLOS
RIZZOLO

JOSÉ TOMÁS
CARRILLO-BATALLA

VICENTE
CARRILLO-BATALLA

Our Core Business is Investment Management

The use of our quantitative and systematic models allows us to advise our clients on optimal investment allocations.

We offer a comprehensive set of advisory services and dedicated resources designed to specifically respond to the needs of our clients. These services include core advisory mandates, discretionary mandates and financial planning.

As an independent investment adviser, we stablish a partnership with the client and provide strategy recommendations and effective solutions that reflect the dynamics of a client’s specific situation.

Advised assets represent non-managed assets that receive strategy-based services, while retaining the client’s authority to make final decisions.

This is our solution for clients wishing to entrust the management of their assets.

We try to build the safest, yet profitable, portfolios we could ever deliver for each of our client’s risk profile.

Our strategies are actively managed and driven by a systematic model with emphasis on capital preservation over multiple market cycles. An optimal asset allocation is the key factor when tracking results and an effort on alpha generation.

VITRAL'S CONCEPT

FOCUSES ON THREE KEY OBJETIVES

THAT ARE FUNDAMENTAL

BUT SOMETIMES MISTREATED:

- CAPITAL PRESERVATION
- PERFORMANCE
- TRANSPARENCY

Using data analysis from the markets, we can determine fundamental and technical risks to develop an essential portfolio architecture.

We first develop an investment hypothesis of current economic fundamentals by analyzing two key market movers: Growth and inflation expectancies.

These factors are determined by systematically identifying macroeconomic news and trends, integrating quantitative and discretionary indicators.

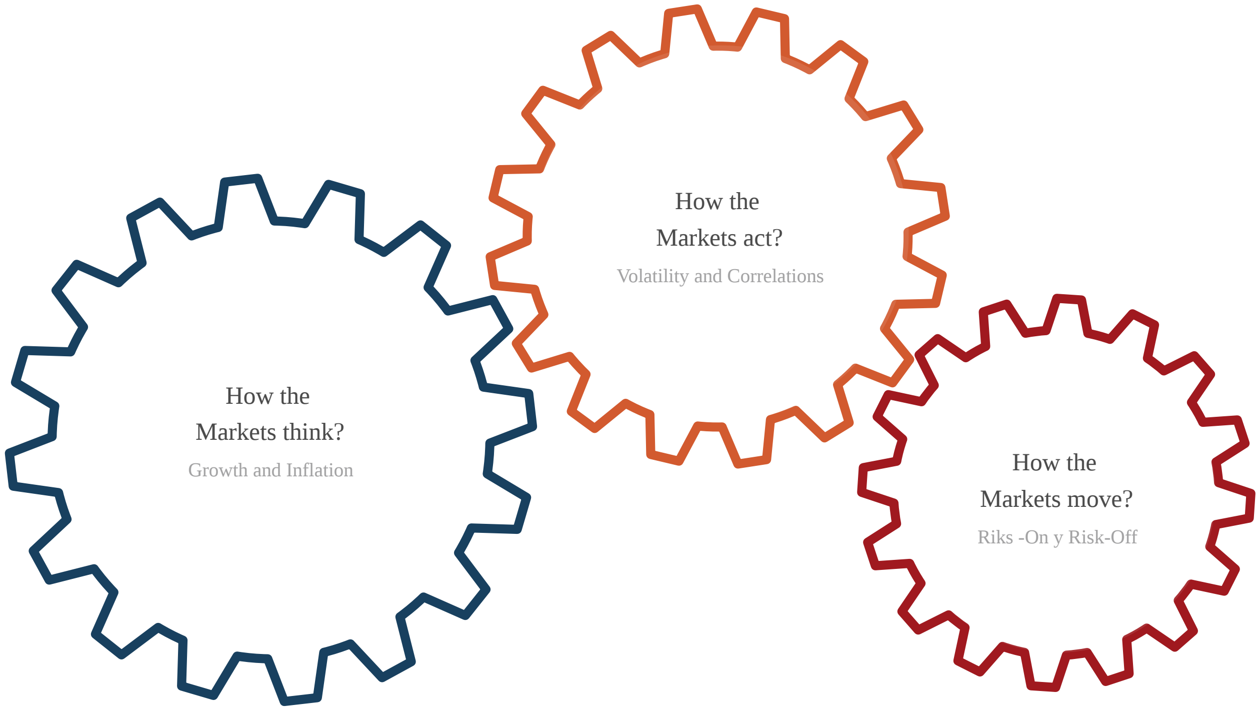
The combination of both metrics will help us determine when and how much risk should be allocated into different assets that have high conviction and probability of appreciation according to present economic cycle. We call this: Smart Allocation

Once risk has been determined and allocated, we proceed with the portfolio's implementation using our technical indicators. These indicators are used to develop a systematic method which helps us observe different opportunity (or threat) signals in the market.

Trend signals and Momentum metrics are two essential technical factors we consider for portfolio implementation.

IN OUR OPINION,

HOW THE MARKETS THINK?



HOW DO

WE FUNCTION?

Data processing
Market Universe

DATA PROCESSING MARKET UNIVERSE

Cash /Short-Term Bonds.

Global High Yield Bonds.

Global Inv. Grade Bonds.

Inflation Linked Bonds.

Global Equities

Small & Mid Cap Equities

REITS.

Commodities.

GET IN

TOUCH

AND LEARN MORE

ABOUT US

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Vitral Advisors LLC is independently owned and operates as a SEC Registered Investment Adviser (RIA) with headquarters in Miami-Florida.

Read our Privacy Policy.

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Last Name*

Email Address*

Phone Number*

Message

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