

# Markaz Corporate Presentation

2024



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# About Markaz

*Established in 1974, Kuwait Financial Centre 'Markaz' is one of the leading asset management and investment banking institutions in the MENA region. Markaz was listed on the Boursa Kuwait in 1997. Since inception, Markaz has attracted and retained a client base of high net worth individuals, governments, quasi-government institutions, and corporations. The Company caters to its client base through the following products and services:*



## **Asset Management**

- Equity Mutual Funds
- Fixed Income Mutual Funds
- Real Estate Mutual Funds
- Private Equity Funds
- Portfolio Management
- Market Maker



## **Investment Banking**

- Mergers and Acquisitions
- Advisory
- Equity and Debt Capital Markets
- Listings
- Restructuring



## **Real Estate**

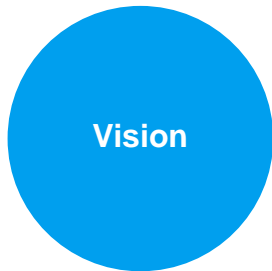
- Middle East and North Africa
- International



## **Research**

- Economic and Policy Research
- Consulting Services

# Our Vision, Mission and Values



*Your partner in  
wealth creation*



*Offer best-in-class  
investment opportunities  
and tailored solutions.*

## *Business Principles*

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### **Client Focus**

- Product offerings customized to the client's needs
- Focus on risk diversification

### **Innovation**

- Focus on quality of returns
- Regularly offering new investment channels

### **Controls**

- Strict investment guidelines and controls
- Ethical dealings and objective reporting across the firm

# Board of Directors



**Mr. Diraar Y. Alghanim**  
Chairman



**Mr. Faisal AbdulAziz  
Al-Jallal**  
Board Member



**Mr. Ayman Abdulatif  
Alshaya**  
Board Member



**Mr. Fahad Yaqoub  
Al-Jouan**  
Board Member



**Mr. Adel M. Alghannam**  
Board Member



**Mr. Omran Habib Hayat**  
Board Member



**Mr. Fahad Sulaiman  
Aldalali**  
Board Member



**Maha Abdulsalam Imad**  
Board Secretary

# Executive Management



**Ali H. Khalil**  
Chief Executive Officer



**Abdullatif W. Al-Nusif**  
Managing Director  
Wealth Management &  
Business Development



**Amani I. Al-Omani**  
Managing Director  
MENA Equities



**Ahmad Al-Falah**  
Managing Director  
Investment Banking



**Raja F. Abrar**  
Executive Vice President and  
Chief Financial Officer



**Alex W. Salamoun**  
Executive Vice President  
Head of Strategic Development  
and Head of Custody



**Ghazi A. Al-Osaimi**  
Executive Vice President  
MENA Equities

# Senior Management



**Rasha A. Othman**  
Executive Vice President  
Investment Banking  
(Fixed Income & Capital Markets)



**Milad A. Elia**  
Executive Vice President  
MENA Real estate



**Maha A. Imad**  
Executive Vice President  
Corporate Affairs



**Ali A. Al-Shamali**  
Executive Vice President  
Treasury, Operations and  
Fund Administration



**Deena Y. Al-Refai**  
Executive Vice President  
Investor Relations



**Pradeep Rajagopalan**  
Executive Vice President  
Analytics and Internal  
Controls



**Kashish Tandon**  
Executive Vice President  
Investment Advisory

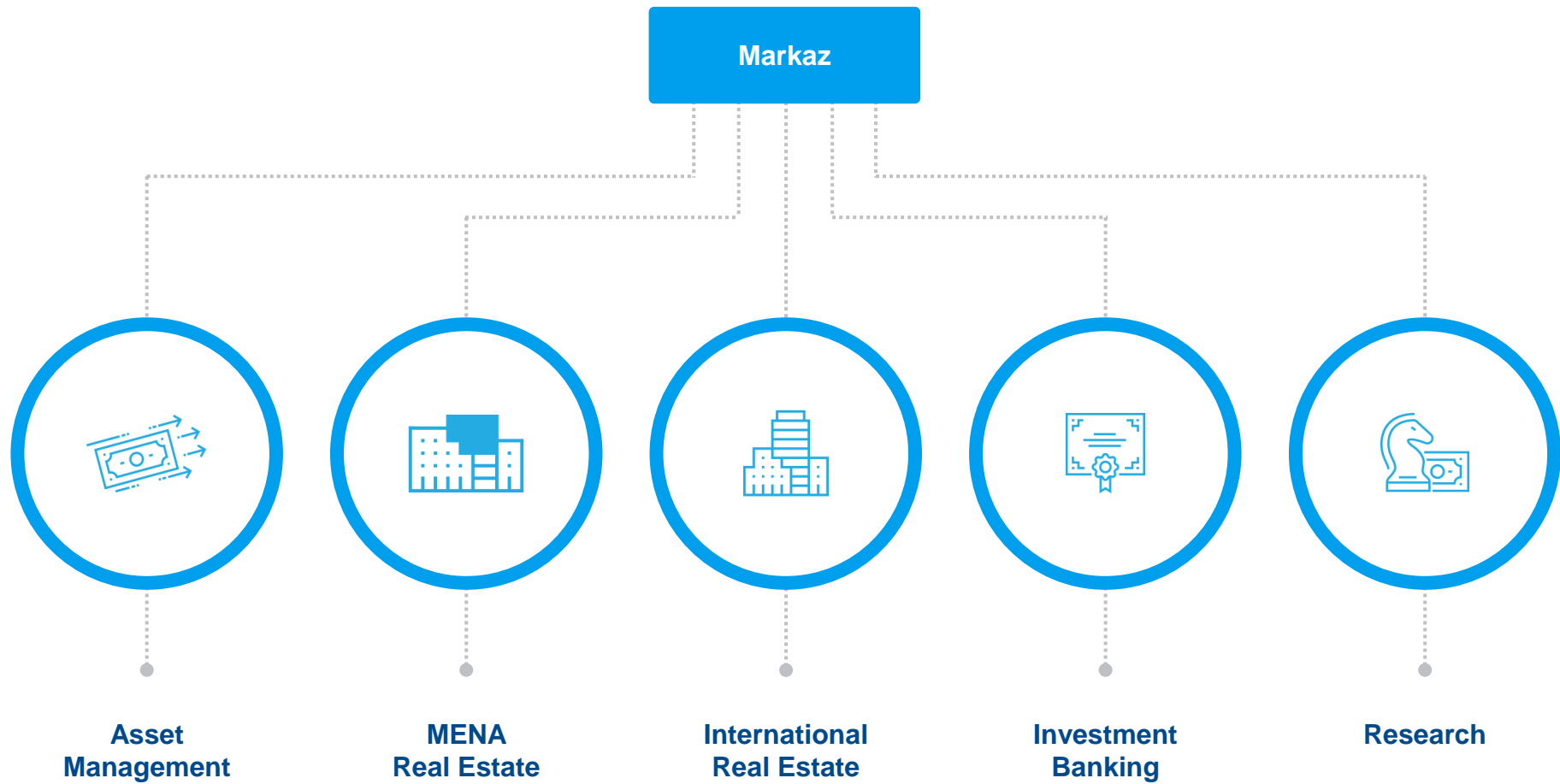


**Abdulrazzaq T. Razooqi**  
Senior Vice President  
Investment Banking  
(Advisory)



**Sadon Al-Sabt**  
Senior Vice President  
International Real estate

# Markaz Offerings





# Awards



**MENA Investment Bank of the Year**  
2023  
**Excellence in Real Estate Investment**  
2023, '24  
**Excellence in Investment Advisory**  
2024



**Best Domestic Private Bank**  
2023  
**Best of Investment Research (Middle East)**  
2023



**Best Momentum Fund Innovation**  
2024  
**Best Private Bank**  
2023  
**Best Investment Bank**  
2011, '12, '14, '15 '16, '17, '18, '19, '20, '21, '22  
**Most Innovative Investment Bank**  
2016  
**Best Asset Manager**  
2015



**Best Local Investment Bank in Kuwait**  
2013, '14, '15, '16, '17, '18, '19, '20, '21, '22, '23  
**Best Asset Manager**  
2013, '14, '15, '16, '17, '18, '19, '20, '21, '22, '23  
**Best Equity House**  
2019  
**Most Innovative Financial Institution in Middle East**  
2018  
**CSR Award in the Middle East**  
'20



**Kuwait Wealth Manager of the Year**  
2022  
**Best MENA Real Estate Asset Manager**  
2021



**Best Wealth Manager in Kuwait**  
2022, '23



**2023 Market Leaders (Digital Solutions, Diversity & Inclusion, CSR, and Investment Banking)**  
2022, '23



**Best Equity Fund in Kuwait - MIDAF**  
2019  
**Kuwait Equity, Markaz Mumtaz Fund**  
2010, '16



**Best Investment Bank**  
2013, '14



**Markaz Arabian Fund**  
2010  
**Markaz Islamic Fund**  
2008, '10, '11, '12  
**Kuwait Equity - Markaz Mumtaz Fund**  
2007, '08, '10, '11, '12



**Best Fund - Markaz Arabian Fund**  
2014

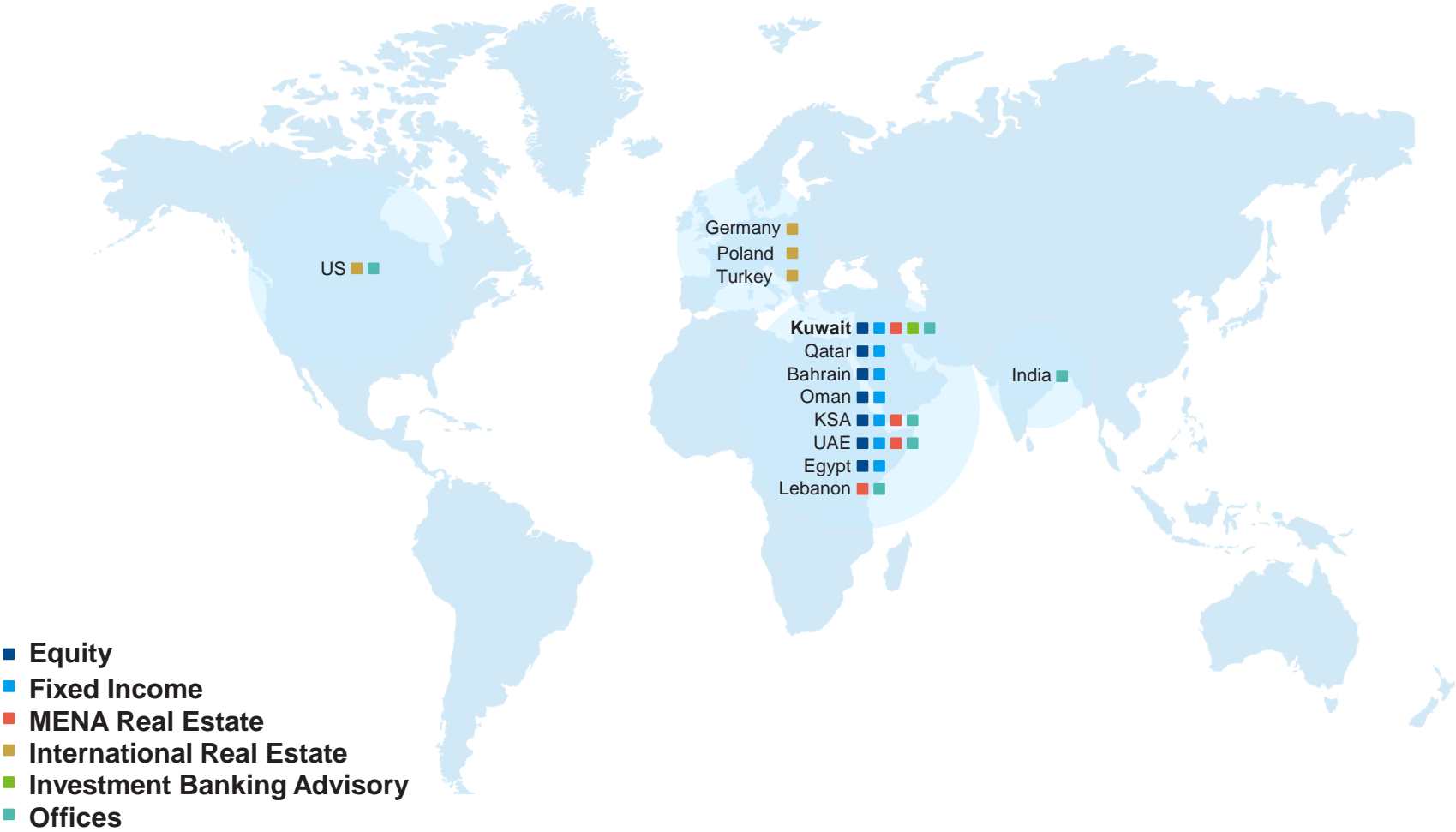


**Markaz Islamic Fund**  
2013



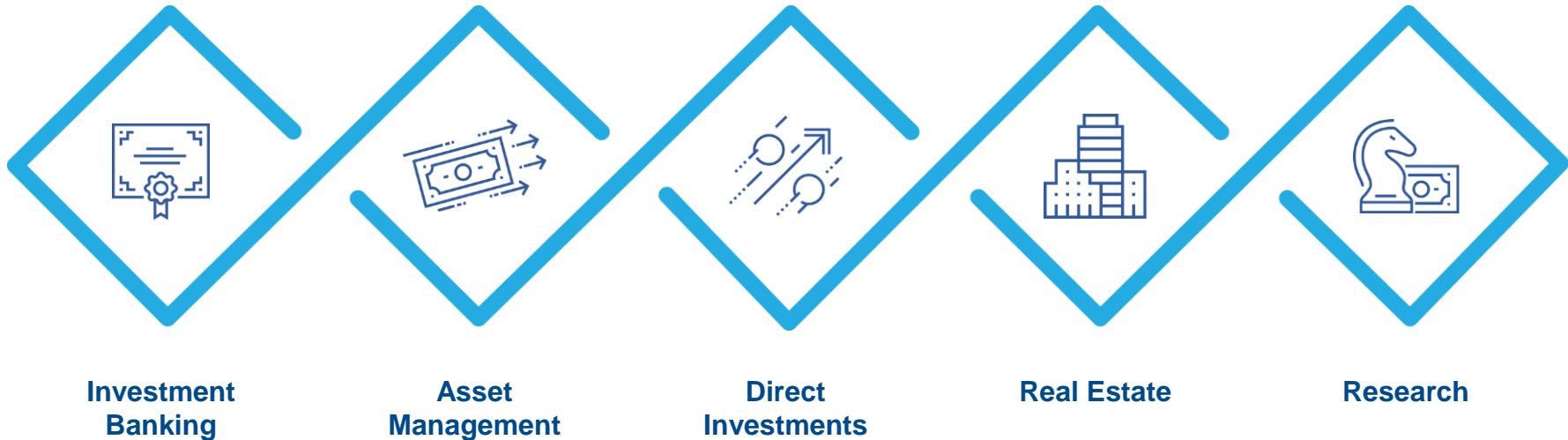
**Kuwait Asset Manager of the Year**  
2019  
**Research Firm of the Year**  
2018  
**Best Equities Manager**  
2015  
**Best Asset Manager**  
2010, '11, '12, '13, '14

# Our geographical reach



# Who we serve

*Since 1974, we have attracted and retained a client base of high net-worth individuals, governments, quasi-government institutions, and investment arms of corporations in the gulf and globally. We continue to serve them through our four main practices: Investment Banking, Asset Management, Real Estate and Research.*



# Our commitment

## To our communities

We believe that by contributing to the success and well-being of our communities, we contribute to our own success in the long-run.

## To our shareholders and clients

At Markaz, we strongly believe in leading by example. That's why we apply strict corporate governance and risk management guidelines that are beyond and above the regulatory requirements. Our compliance with prudent investment guidelines, and proper monitoring and management of risk enabled us to survive the current storm and to remain a fundamentally sound institution.



# Thank you.



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[markaz.com](http://markaz.com)