

For immediate release

Thursday 15 January 2026

BORDIER UK POSTS RECORD ASSETS UNDER MANAGEMENT UNDER NEW CEO**Robin Perry appointed Deputy CIO**

January marks the first anniversary of Ian Heap's leadership as CEO, 2025 proving to be one of the most successful in Bordier UK's illustrious 45-year history. The Company continues to attract the interest of intermediary firms looking to outsource their investment management, and with a renewed focus on its relationships in the private client community, posted record assets under management in 2025, standing today at c£2.3bn. One of the few private investment managers of scale serving the UK market, the firm is evolving steadily under Heap, who joined the business more than 20 years ago.

Recognising his contribution to the firm's continuing success, as well as his deft skills in communicating to the professional adviser community the firm's investment strategy, economic and market views – as well as the key decisions taken and changes made by the Investment Committee – Bordier UK today confirmed the appointment of Robin Perry as Deputy CIO. Perry, whose career in investment management spans more than three decades, in various portfolio management and fund analyst roles, joined Bordier UK in 2019.

Stability and experience are the very bedrock of Bordier UK's business, its Investment Committee members having worked together for many years, with Mark Robinson having served more than 25 years as CIO. Consistency and continuity are the tenets underpinning long-lasting client relationships and a detailed understanding of clients' needs, with long tenure an enduring characteristic of the business.

As Perry steps up, the Company also confirmed the resignation of Dipesh Mesuria, Head of Fund Research. Mesuria joined Bordier UK in 2012 and has after 14 years with the St James's based firm, expressed his desire to seek a new challenge.

"Dipesh is set to leave us in June and will depart with the Company's very best wishes, and our gratitude for the part he has played in our continuing success", said Heap. "Mark, Robin and the wider investment team will continue to work closely together over the coming months, whilst we review our wider requirements."

- Ends -

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BORDIER UK POSTS RECORD ASSETS UNDER MANAGEMENT UNDER NEW CEO.../2**Notes to editors****About Bordier & Cie (UK) PLC**

Established in 1981 by Jamie Berry, Bordier UK (then Berry Asset Management) is part of the Geneva headquartered Bordier & Cie. Based in St James's, at the heart of London's wealth management district, the company is an award-winning wealth and investment manager, with a single focus – providing investment and wealth management services to private clients, the clients of professional advisers, family offices, trustees, charities, City livery companies and others.

www.bordieruk.com

About Bordier & Cie

Bordier & Cie is built on solid foundations with a Tier 1 CET ratio of 30.8%¹. Established in Geneva in 1844, the Group employs circa 280 staff globally, 40 of whom work within Bordier UK; has offices in Bern, Brest, Geneva, Lausanne, London, Montevideo, Nyon, Paris, Rennes, Singapore, Turks & Caicos Islands and Zurich; manages more than £17.4bn in assets¹.

Bordier & Cie is owned and managed by the descendants of the founding families – the Partners having unlimited personal liability for all transactions. This distinctive aspect, together with its financial solidity, enables the Bordier Group to focus clearly on its clients' long-term goals, rather than on the short-term targets of outside shareholders.

www.bordier.com

¹ 30 June 2025

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