



# COPERNICO CAPITAL



# COPERNICO CAPITAL

## About Us

Copernico is a licensed investment dealer providing advanced wealth management, financial advisory, and specialized financial solutions.

We support private clients, entrepreneurs, and corporate entities who require a professional and reliable partner to navigate the complexities of financial markets and asset protection.



## What We Do

We offer integrated and modular services: discretionary portfolio management, financial advisory, financial planning, custody solutions, order execution only, and professional assistance for opening international bank accounts.

## Mission

We help our clients understand and manage their finances through transparent, solid, and personalized solutions.

# OUR SERVICES

## FINANCIAL PLANNING

A holistic and independent approach that transforms life goals into clear, measurable outcomes through tailored financial solutions.

### What we do:

- Pension Planning
- Tax Planning
- Risk Management
- Estate & Succession Planning
- Asset Management

Designed for clients who value a comprehensive, coordinated strategy to manage and protect their personal and family wealth.



## PORTFOLIO MANAGEMENT

Discretionary and professional portfolio management fully aligned with each client's financial goals and risk profile.

### What we do:

- Discretionary portfolio management with full independency
- Dynamic allocation adjustments based on market conditions
- Selection and execution of financial instruments within the mandate
- Efficient operation through custodian bank powers
- Ongoing monitoring and transparent reporting

For clients seeking professional asset management with full delegation.

# OUR SERVICES

## FINANCIAL ADVISORY

Personalized and independent investment advice aligned with each client's needs and financial profile.

### What we do:

- Assess objectives, risk tolerance, and financial situation
- Analyse a broad range of instruments without market restrictions
- Provide tailored recommendations through an Advisory Report
- Ensure regulatory suitability
- Transmit orders to brokers upon request

For clients who want to remain in control while relying on expert guidance.



## ORDER EXECUTION ONLY

Efficient and compliant execution of investment orders.

### What we do:

- Receive instructions and transmit orders for execution
- Manage documentation and execution workflows
- Provide the service independently or integrated with advisory and custody solutions

For clients seeking operational efficiency and regulatory compliance.

# OUR SERVICES

## CUSTODY SOLUTIONS

The Company holds securities in its own name exclusively for the client, providing access to a wide range of financial instruments.

### What we do:

- Hold any security as nominee on behalf of the client
- Simplify and speed up investment and settlement processes
- Safeguard client funds in segregated accounts
- Ensure strict asset segregation and custody
- Eliminate the need for a personal securities account, reducing related costs and increasing confidentiality.

For clients seeking a structured framework for acquiring and holding financial instruments, ensuring confidentiality and professional oversight.



## BANK ACCOUNT SERVICES

Professional support for opening local and international bank accounts.

### What we do:

- Leverage strong relationships with private banks and global institutions
- Assist in preparing and opening accounts at selected banks
- Organize documentation and manage KYC/AML onboarding
- Coordinate and handle communications with banking partners

For private and corporate clients seeking a compliant and legitimate banking relationship offering structured and discreet solutions.

# Contact Us



Website

[www.copernico.capital](http://www.copernico.capital)

---



E-mail

[info@copernico.capital](mailto:info@copernico.capital)

---



Address

Level 2, Suite 201, The Catalyst,  
40 Silicon Avenue, Ébène, 72201  
Republic of Mauritius

---



COPERNICO  
CAPITAL