FREQUENTLY ASKED QUESTIONS

Where is incorporated OTB Global Investments Research?

OTB Global Investments Research was founded in London (United Kingdom) and in 2022 we decided to relocate the main office in Milan (Italy). Today, OTB is an Italian company (company number 12688440960).

Does OTB hold client money?

No, OTB does not hold client money and will never do so. To our international client we provide analysis and research with focus on US and European equities.

What is the price of your services?

We have three main services:
Bronze, € 200
Silver, € 2000 or 3%
Gold, € 3500 or 4%

If the client or company required a different service, we are ready to assist any needs with personalised price offers.

What is a weekly market brief?

OTB generates for its clients on a weekly basis a market analysis of the major financial indices across Europe, Middle East and United States: in particular we cover FTSE 100, FTSEMIB, DAX 40, TADAWUL All Shares, Dubai Financial Market, S&P500, NASDAQ 100, DOW JONES INDUSTRIALS.

The indices are analysed with their ETF correspondent, make it easier for clients to implement investment strategies.

The brief is made of a summary page to give a general overview of markets together with a detailed graph analysis.

What is the U.S. Options report?

We monitor over 40 financial instruments and by matching volumes and open interest we are able to provide to our clients what the options market is currently pricing in for the week ahead.
By being a mathematical study, 80% of the time the value falls between the identified levels helping clients in their long/short strategies.

As of today we monitor E-mini Futures, sector ETF and major tech stocks.

What is the difference between a model and a fully personalised portfolio?

A model portfolio doesn't take into account how the client is currently invested, therefore the final solution may have excessive exposure towards certain sectors and/or equities.

A fully personalised portfolio takes into account how the client is currently invested and focus on those sectors and/or equities that, by not being present in current investments, can generate positive performance over 12 -18 months time and don't expose the client to excessive risk.

Which level of interaction shall I expect from OTB?

Our clients receive on a monthly basis an update on the current strategy with comments on the portfolio and if there are any revisions in price targets.
We are always available for our clients to discuss current market conditions, investment opportunities and how we are positioned for the months ahead.

Will I get access to a platform?

No, we don't give our clients access to any platform. After initial meetings with our clients we give them a strategy ready to be implemented.
We are the independent investment advisor for our clients, therefore we elaborate a strategy and a solution based on the needs they shared with us.

Do you have partnership with financial brokers?

Yes, we have an established partnership with a financial broker.

What do you mean with "liquidity management"?

When we provide the asset allocation for the recommended portfolio, we also provide liquidity management: this means we advise on how the liquidity and capital available should be managed over the 12-18 months time.

On the selected strategy, we generally advise not to use all the liquidity at once but rather gradually increase the exposure over 2-3 operations.

Do not hesitate to get in touch with the Team for more information

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