



The private equity pioneer in Switzerland

Interview with Patricia Falco Beccalli



She is best known for her role as a long-standing CNBC presenter. But Patricia Falco Beccalli is much more - an investor and co-founder of the global private equity company Falco Global Partners. As a model entrepreneur in an up-and-coming industry that is dominated by men, she has recently made a name for herself with the "Falco Protection Fund".

Mrs Falco Beccalli, for many years as a CNBC anchor on the pulse of the economy and financial markets. What makes investing in unlisted companies so interesting right now?

Patricia Falco Beccalli: My time as a financial journalist at NBC gave me a deep insight into the dynamics of global markets and the challenges facing companies. Being directly involved in unlisted companies offers the opportunity to pursue long-term strategies away from the often short-sighted quarterly targets of the stock market. You can closely work with the companies to implement operational improvements and promote sustainable growth. It also makes it possible to invest in innovative business models and technologies that are not yet in the spotlight of the public markets. And last but not least, it should be added that a successful exit from our investments may well be a successful stock market.

What about the life partner of a company?

Patricia Falco Beccalli: Founding and running a company with your life partner is both a great opportunity and a challenge. On the one hand, it has many advantages: you know each other on a deep level, trust each other and often share a common vision. This close connection can speed up decision-making and create an exceptional basis of trust - an invaluable advantage in the business world. My husband Nani Falco Beccalli, who in GE top management around the world for decades, is the ideal life and business partner for me.

At the same time, this constellation requires clear structures and a conscious separation of professional and private life. It is important to define clear roles and responsibilities in order to minimise conflicts. Transparent dialogue, regular strategic discussions and mutual respect for each other are essential.

The dialogue of different opinions is essential for successful cooperation.

In the private equity sector, where decisions often have a major financial impact, such a partnership can benefit from mutual complementarity. Different strengths and perspectives - whether strategic, operational or communicative - can enrich the company. Ultimately, the key to success is to see each other as a team, to act professionally and at the same time to preserve private space. Ultimately, it is also important to show investors that gender diversity in top management and the issue of succession have been part of our corporate identity and values since the company was founded.

Private equity/investors a reputation as 'locusts'. Is this just about making a quick profit in the sense of in-out investments?

Patricia Falco Beccalli: This reputation is a misconception that does not apply to all private equity firms. At Falco Global Partners, we take a different approach. Our focus is on long-term investments in which we work closely with companies to sustainably increase their value. We not only contribute capital, but also our operational expertise to work with the management improvements.

and to realise growth potential. This is the DNA of our company: we always ask ourselves in the 'deal sourcing' phase how we can realise long-term operational value for the company and its employees.



all stakeholders. Of course, financial aspects always play an important role, but operational involvement (not just financial involvement) creates stable companies and business centres in the long term. Our goal is and remains to build stable and successful companies that will endure in the long term.

Preparations for the launch of the Falco Protection Fund" are running at full speed. What are underlying considerations?

Patricia Falco Beccalli: The "Falco Protection Fund" was set up to invest in medium-sized companies that operate in areas that we consider essential for a safe and sustainable life. These include physical and digital security, energy security and the protection of supply chains in food production. In view of global macroeconomic, geopolitical and technological trends, we see significant growth opportunities in these sectors. Our aim is to achieve both economic success and social benefit through targeted investments in these areas. Digital innovations play a central role here, even in traditional infrastructure-driven companies.

What makes this fund unique and for which investor profile is it particularly attractive?

Patricia Falco Beccalli: The "Falco Protection Fund" is characterised by its thematic investment approach, which is focused on the essential protection needs of our society. We

We are aiming for majority shareholdings and are focussing geographically on Europe and the USA with investment sizes of between USD 50 and 300 million. The fund is expected to have a size of approximately USD 1.2 billion with very low leverage. Our unique combination of financial strength and deep operational expertise enables us to not only support companies financially, but also to actively increase their value. This fund is particularly attractive to investors with a long-term focus who value sustainable value creation and social impact.

Your fund is domiciled in Singapore. What role does the Swiss location play?

Patricia Falco Beccalli: Although the "Falco Protection Fund" is domiciled in Singapore, Switzerland remains a central location for Falco Global Partners. An important reason for domiciling the fund in Singapore is that Asian and Middle Eastern investors rely heavily on Switzerland.

are more closed to invest in our "Falco Protection Fund". For our European LPs, we will be domiciled in Luxembourg. Our **head** office is in Wollerau SZ, and we manage many of our operational **activities** here. **With** its stable political and economic situation and excellent **financial** centre, Switzerland **offers** ideal conditions for our business **activities**. In addition, Switzerland's international orientation gives us access to global markets and **investors**.

Falco Global Partners "operational excellence". How does this come into play in connection with the fund?

Patricia Falco Beccalli: Operational excellence **is** a central component of our **investment strategy**, because private equity **means** more to us than just **providing** capital. We make **targeted** investments in companies that can **achieve** sustainable value **growth** through strategic and operational improvements.

In the case of **the** Falco Protection Fund, this means that we **not** only **provide** funding, but also actively **participate** in the further development of the portfolio **companies**. Our team **brings** in-depth expertise in the areas of **corporate** strategy, digital **transformation**, efficiency **enhancement** and scaling. This enables us to **optimise** processes, minimise operational risks and realise long-term growth potential.

We work closely with company **management** to **implement** best practices from various industries. The focus **is** on sustainable **value** creation, **not short-term** profits. In this way, we ensure that our investments are **not** only financially successful, but also remain resilient in the face of economic and geopolitical challenges.

Equities and other traditional investments currently appear to be overheated. How does private equity benefit here as an alternative asset class?

Patricia Falco Beccalli: In times of **volatile** stock markets and high valuations of traditional asset classes, private equity becomes particularly attractive as an alternative form of investment. While public markets heavily **influenced** by short-term fluctuations, geopolitical **uncertainties** and central bank decisions, private equity **offers** a more long-term perspective. A **key** advantage **is** that private equity **investors** can exert a direct influence on companies. **Instead** of relying on market **movements**, we have **the opportunity** to create **value** through strategic measures and operational improvements. In addition, private equity investments are less dependent on speculative **market** sentiment and can benefit from long-term economic trends. Particularly in **overheated market** phases, private equity **offers** access to attractive companies **with** stable **growth** potential that are **not listed** on the stock exchange. This **enables investors** to remain **broadly diversified** and **benefit** from long-term value appreciation without being **exposed** to the daily fluctuations of the stock markets.



Protection is the overarching theme of the fund. What specific areas does the fund cover and how is investor protection guaranteed?

Patricia Falco Beccalli: The "Falco Protection Fund" focuses on investments in companies that address the essential protection needs of modern **society**. Four core areas are at the **centre** of this:

1. Physical **security** of people - investing in companies that develop innovative solutions for the protection of infrastructure, **critical utilities** and people.
2. Digital **security** & data protection - Promotion of **cybersecurity** technologies and solutions for securing data and networks.
3. Energy security - investments in companies that offer sustainable energy solutions and contribute to the **stability** of energy **supply** chains.
4. Protecting the food supply Supporting companies that focus on sustainable **agriculture**, food production and **supply** chain- management.

In terms of investor protection, we focus on maximum transparency, clear governance structures and active risk **management**. Our **investment approach** combines conservative due diligence processes **with** long-term strategies to minimise risks. In addition, the structuring of the fund in Singapore ensures a stable regulatory environment that **meets** international standards.

For a long time, private equity was a male-dominated industry. Nowadays, more and more women are among the top performers. What led to this development?

Patricia Falco Beccalli: The increasing presence of women in private equity is the result of several parallel developments. Firstly, **there is** a **growing** awareness in the financial sector of the **advantages** of diverse teams. Studies show that heterogeneous teams make better investment decisions and are more successful in the long term. **Secondly**, more and more companies **are focusing** on support programmes and **mentoring** to bring female talent into management positions. Many private **equity** firms have **launched diversity** initiatives aimed at actively **recruiting** and promoting women and placing them in management positions.

roles. **Thirdly**, the traditional image of the financial sector **has changed**. Networks such as "Level 20" or "Warnen in Private Equity" have increased the **visibility** of women in the industry and created new role models. Institutional investors are also **paying more attention to working with** fund managers who take diversity **seriously**.

Although **there** is still a lot of potential for further progress, a clear trend is emerging: women are increasingly taking on management positions in the private equity sector and are having a lasting **impact** on the industry.

Falco.
GLOBAL PARTNERS

Falco Global Partners AG
Färberstrasse 3
8832 Wollerau
<https://falcoglobalpartners.com>