



**EUROMONEY**  
**PRIVATE BANKING**  
**AWARDS 2026**

**Euromoney**

**Private Banking Awards 2026**

Methodology and Guidelines

# Contents

Introduction	3
Award Categories	4
Award Category Criteria	6
Methodology	38
How to Submit	40

# Introduction

## Who Can Enter

- Private Banks
- Wealth Managers/Multi-Family Offices/Robo-Advisors
- Investment Managers
- Technology Providers
- Insurance Providers

## Benefits of Participation

- Enhance your business's reputation within the global private banking and wealth industry among clients through independent validation and accreditation
- Gain meaningful feedback into your business from our team of research analysts
- Celebrate your business's achievements in the sector
- Demonstrate to clients the value and commitment your business brings to the industry
- Access marketing logos and other promotional collateral
- Receive coverage on Euromoney.com in the form of award write ups and market trend and benchmarking reports
- Secure an invitation to attend the Euromoney Private Banking Awards ceremony
- There is no fee to participate in the research or connected to winning an award

## Research Timeline

- Period Under Determination: 1 July 2024 to 30 June 2025
- Submissions Open: 23 September 2025
- Submission Deadline: 31 October 2025
- Research Interviews: September – November 2025
- Winners Notified: January 2026
- Awards Ceremony: March 2026
- Results and Analysis Published: March 2026

# Award Categories

## Private Banks

These awards are offered globally, regionally and at a country/territory level. Where this *is not* the case, it is clearly indicated below.

- Best Private Bank
- Best International Private Bank (**REGIONAL AND COUNTRY/TERRITORY ONLY**)
- Best Private Banker (**GLOBAL ONLY**)
- Best Pure Play/Boutique Private Bank
- Safest Private Bank **\*\*NEW\*\***
- Best for Premier Banking **\*\*NEW\*\***

## Private Banks/Independent Wealth Managers/Multi-Family Offices

These awards are offered globally, regionally and at a country/territory level.

- Best for Ultra-High-Net Worth (UHNW)
- Best for High Net Worth (HNW)
- Best for Family Office Services
- Best for Succession Planning
- Best for Next-Gen
- Best for Client Service **\*\*NEW\*\***
- Best for Discretionary Portfolio Management
- Best for Alternative Investments
- Best for Funds
- Best for Digital Solutions
- Best for Digital Assets **\*\*NEW\*\***
- Best Wealthtech **\*\*NEW\*\***
- Best for Sustainability
- Best for Impact Investing **\*\*NEW\*\***
- Best for Equities **\*\*NEW\*\***
- Best for Fixed Income **\*\*NEW\*\***
- Best for FX **\*\*NEW\*\***
- Best for Structured Products **\*\*NEW\*\***
- Best Chief Investment Office
- Best for Real Estate Financing

## Independent Wealth Managers/Multi-Family Offices

These awards are offered globally and regionally. Where this *is not* the case, it is clearly indicated below.

- Best Independent Wealth Manager (**GLOBAL, REGIONAL AND COUNTRY/TERRITORY**)
- Best Independent Wealth Manager for Succession Planning
- Best Independent Wealth Manager for Discretionary Portfolio Management
- Best Independent Wealth Manager for Alternative Investments
- Best Independent Wealth Manager for Digital Solutions

## Investment Managers

These awards are offered globally and regionally.

- Best Investment Manager - Private Equity **\*\*NEW\*\***
- Best Investment Manager - Private Credit **\*\*NEW\*\***
- Best Investment Manager - Public Equities **\*\*NEW\*\***
- Best Investment Manager - Fixed Income **\*\*NEW\*\***

## Technology Providers

These awards are offered globally. Where this *is not* the case, it is clearly indicated below.

- Best Technology Provider for Wealth Management (**GLOBAL AND REGIONAL**)
- Best Core Banking Solution for Wealth Management
- Best Front Office Solution for Wealth Management **\*\*NEW\*\***
- Best Trading and Execution Solution for Wealth Management **\*\*NEW\*\***

## Insurance Providers

This award is offered globally and regionally.

- Best Insurance Provider for Wealth Management **\*\*NEW\*\***

# Award Category Criteria

Listed below are the award categories, definitions and the primary assessment criteria used to decide winners.

Entrants should focus their submission(s) on how their business has developed over the period under determination (1 July 2024 – 30 June 2025).

Strong entries are those that provide the key metrics requested by Euromoney to underscore the impact a business has made in terms of its operations, its clients or the market through enhancements to strategy, products, and services.

## Private Banks

### Best Private Bank

The private bank in the world, region or country/territory, that has demonstrated during the review period exceptional performance across all dimensions of private banking. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Global Entrants: International private banks operating globally

Eligible Regional Entrants: Regional private banks operating in their home region

Eligible Country/Territory Entrants: Domestically headquartered private banks

Key Performance Indicators:

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

Assessment Criteria:

- Evidence of increase in wallet share among target clientele
- Successful execution of market strategy as set out by leadership
- Successful launches of relevant and market-leading investment products and services

- Evidence of attracting and maintaining key front-office talent
- Evidence of market-leading and relevant digital solutions for clients
- Evidence of commitment to sustainability and ESG

## **Best International Private Bank**

The non-domestically headquartered private bank in the region or country/territory, that has demonstrated during the review period exceptional performance across all dimensions of private banking. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic Levels Awarded at: Regional and country/territory

Eligible Regional Entrants: International private banks operating outside of their home region

Eligible Country/Territory Entrants: Non-domestically headquartered private banks

- Key Performance Indicators:
  - Assets under management (AUM)
  - Revenue
  - Net new assets/net new money (NNA/NNM)
  - Return on assets (ROA)
  - Cost-to-income ratio
  - RM Headcount
  - RM-to-client ratio
- Assessment Criteria:
  - Evidence of increase in wallet share among target clientele
  - Successful execution of market strategy as set out by leadership
  - Successful launches of relevant and market-leading investment products and services
  - Evidence of attracting and maintaining key front-office talent
  - Evidence of market-leading and relevant digital solutions for clients
  - Evidence of commitment to sustainability and ESG

**Best Private Banker**

The Best Private Banker award honours the private banker who within the review period has demonstrated exceptional leadership within the private wealth space. This accolade recognises a senior executive who has demonstrated outstanding strategic vision, client relationship excellence, and industry influence. The winner exemplifies the highest standard of private banking leadership through their approach to innovation, team development, and measurable business impact through their strategy and advice.

Geographic Levels Awarded at: Global

Eligible Entrants: Private bankers

Assessment Criteria:

- Evidence of strategy and execution that has profoundly benefited his/her business
- Evidence of leadership in sustainability, ESG and technological innovation
- Evidence of profound positive impact on broader private banking and wealth industry

**Best Pure Play/Boutique Private Bank**

The pure-play or boutique private bank in the world, region or country/territory, that has demonstrated during the review period exceptional performance across all dimensions of private banking. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: Institutions principally engaged in the business of private banking

Key Performance Indicators:

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Assessment Criteria:
- Evidence of increase in wallet share among target clientele

- Successful execution of market strategy as set out by leadership
- Successful launches of relevant and market-leading investment products and services
- Evidence of attracting and maintaining key front-office talent
- Evidence of market-leading and relevant digital solutions for clients
- Evidence of commitment to sustainability and ESG

## **Safest Private Bank**

The Safest Private Bank award recognises a private bank that has demonstrated during the review period an exceptional commitment to protecting client assets through comprehensive risk management frameworks and robust operational safeguards. The winning private bank will have showcased a holistic approach to safety that combines regulatory compliance excellence, operational resilience and innovative risk mitigation strategies to provide its clients with the highest levels of asset protection and peace of mind.

**Geographic Levels Awarded at:** Global, regional and country/territory

**Eligible Entrants:** Private banks

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Capital adequacy ratio (CET1)
- Credit loss ratio

**Assessment Criteria:**

- Evidence of the institution's capital strength
- Evidence of commitment to client protection (suitability assessments and investment recommendation frameworks)
- Evidence of know-your-customer (KYC) and anti-money laundering (AML) excellence
- Evidence of robust operational resilience and business continuity planning
- Evidence of strong reputational risk management and compliance track record

## **Best for Premier Banking**

This award recognises a banking institution globally, regionally and at a country/territory level, that has demonstrated exceptional success in serving mass affluent clientele and creating a seamless pathway for progression into private banking services. The winning bank will have showcased for the review period innovative investment and wealth management product offerings, sophisticated digital delivery models, and a scalable operational model that nurtures client relationships from premier banking/mass affluent through to high-net-worth/ultra-high-net-worth status.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: Institutions that serve both private banking and mass affluent/premier clientele

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Assessment Criteria:
- Evidence of substantial client progression from premier to private banking segments
- Evidence of rising wallet share in mass affluent/premier banking segment
- Evidence of innovation across investments, lending and advisory solutions for mass affluent clients
- Evidence of sophisticated, digitally-enabled service delivery for mass affluent clients
- Evidence of sophistication of premier banking RMs in terms of services and products

## **Independent Wealth Managers/Multi-Family Offices**

### **Best Independent Wealth Manager <sup>\*\*NEW\*\*</sup>**

The independent wealth manager/multi-family office in the world or region, that has demonstrated during the review period exceptional performance across all dimensions of

wealth management. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

**Geographic Levels Awarded at:** Global, Regional and Country/Territory

**Eligible Global Entrants:** Independent wealth managers and multi-family offices operating globally

**Eligible Regional Entrants:** Regional Independent wealth managers and multi-family offices operating in their home region

**Key Performance Indicators:**

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

**Assessment Criteria:**

- Evidence of increase in wallet share among target clientele
- Successful execution of market strategy as set out by leadership
- Successful launches of relevant and market-leading investment products and services
- Evidence of attracting and maintaining key front-office talent
- Evidence of market-leading and relevant digital solutions for clients
- Evidence of commitment to sustainability and ESG

## **Best Independent Wealth Manager for Succession Planning**

The independent wealth manager or multi-family office at a global and regional level that has excelled in facilitating seamless wealth and business transitions of its clientele from one generation to the next during the period under review. The winner will also have demonstrated an expertise in complex estate planning, trust structures, family governance and tax efficiency, while also providing education and support for multi-generational wealth preservation.

Applicants should be able to showcase their ability to co-ordinate multi-disciplinary teams, navigate multiple jurisdictions and implement sophisticated wealth structures.

**Geographic Levels Awarded at:** Global and regional

**Eligible Entrants:** Independent wealth managers and multi-family offices

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

**Assessment Criteria:**

- Examples of success in executing complex family wealth transfers
- Evidence of how succession planning services have led to higher wallet share
- Evidence of sophisticated offering across tax planning, trust, and family governance solutions
- Examples of co-ordination with third-party service providers
- Evidence of dedicated and experienced wealth and succession planning personnel

### **Best Independent Wealth Manager for Discretionary Portfolio Management**

The independent wealth manager or multi-family office at a global or regional level that has excelled in providing active investment management services on behalf of its clientele during the review period, through outstanding portfolio construction, risk management, and overall performance. The winner will be able to demonstrate superior investment acumen, robust governance, and sophisticated asset allocation strategies for its clients with a track record for delivering above market returns on a risk-adjusted basis.

**Geographic Levels Awarded at:** Global and regional

**Eligible Entrants:** Independent wealth managers and multi-family offices

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)

- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Penetration rate of DPM by total client AUM (%)
- Performance of balanced multi-asset mandate (%)
- Assessment Criteria:
  - Evidence of superior investment returns on risk-adjusted basis
  - Evidence of successful fund-raising across discretionary mandates
  - Evidence of innovative product launches and customisation across asset classes
  - Evidence of sophisticated risk management frameworks and monitoring
  - Evidence of integration of ESG and sustainability processes

### **Best Independent Wealth Manager for Alternative Investments**

The independent wealth manager or multi-family office at a global or regional level that has provided its clients with exceptional access and expertise in alternative asset classes including private equity, private credit, hedge funds, real estate and infrastructure. The winning applicant will be able to demonstrate superior due diligence capabilities, stronger asset management relationships, innovative product structuring, and comprehensive risk management while deliver investment opportunities that boost portfolio diversification and returns.

**Geographic Levels Awarded at: Global and regional**

**Eligible Entrants: Independent wealth managers and multi-family offices**

- Key Performance Indicators:
  - Assets under management (AUM)
  - Revenue
  - Net new assets/net new money (NNA/NNM)
  - Return on assets (ROA)
  - Cost-to-income ratio
  - RM Headcount
  - RM-to-client ratio
  - Penetration of alternative investments by AUM (%)

- NNA into alternative investments
- Assessment Criteria:
- Evidence of rising wallet share and fundraising across alternative investments
- Evidence of exemplary performance across alternative investments on risk-adjusted basis
- Evidence of innovative product launches and customisation across alternatives
- Evidence of sophisticated risk management frameworks and monitoring
- Evidence of integration of ESG and sustainability processes

## **Best Independent Wealth Manager for Digital Solutions**

This award recognises an independent wealth manager or multi-family office at a global and regional level that has demonstrated operational excellence in digital transformation across all touchpoints of the client journey during the period under review. The successful applicant will have implemented comprehensive digital capabilities that enhance client experience while maintaining the personalised services that are crucial to private banking. Entrants must showcase leadership in AI adoption, mobile-first platforms, seamless digital onboarding, secure client collaboration tools and robust cybersecurity measures.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Independent wealth managers or multi-family offices

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Digital platforms adoption rate (%)
- Trades executed via digital platforms (%)
- Assessment Criteria:
- Evidence of a superior mobile and digital experience for clients
- Evidence of seamless integration of artificial intelligence to support RMs and clients
- Evidence of advanced, secure digital communications and collaboration

- Evidence of comprehensive and seamless cybersecurity and threat detection architecture
- Evidence of enhanced digital onboarding and know your customer (KYC) processes

## **Private Banks/Independent Wealth Managers/Multi-Family Offices**

### **Best for Ultra-High-Net Worth (UHNW)**

The private bank in the world, region or country/territory, that has demonstrated during the review period exceptional performance in terms of services and solutions for UHNW clientele. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers that serve UHNW clientele (Euromoney leaves it the discretion of applicants to determine what they classify as UHNW)

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- UHNW+ assets
- RM Headcount
- RM-to-client ratio
- Assessment Criteria:
- Evidence of rising wallet share in UHNW client segment
- Evidence of sophisticated, bespoke product offering across traditional and alternative assets
- Evidence of sophisticated, multi-jurisdictional wealth planning offering
- Evidence and examples of high-touch, experienced UHNW RM teams
- Evidence of sophisticated digital delivery models for UHNW clientele

## **Best for High Net Worth (HNW)**

The private bank in the world, region or country/territory, that has demonstrated during the review period exceptional performance in terms of services and solutions for HNW clientele. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic vision while maintaining the highest standards of fiduciary responsibility. The winner will have excelled in delivering comprehensive wealth solutions, from traditional portfolio management and advisory, to cutting-edge digital platforms and alternative investments.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers that serve HNW clientele (Euromoney leaves it to the discretion of applicants to determine what they classify as HNW)

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- HNW assets
- RM Headcount
- RM-to-client ratio

Assessment Criteria:

- Evidence of rising wallet share in HNW client segment
- Evidence of sophisticated product offering across traditional and alternative assets
- Evidence of sophisticated wealth planning offering
- Evidence and examples of dedicated HNW RM teams
- Evidence of sophisticated digital delivery models for HNW clientele

## **Best for Family Office Services**

The private bank at a global, regional and country/territory level that has provided comprehensive, multi-generational wealth solutions for family offices and their gatekeepers during the period under review. This accolade honours banks that have achieved outstanding business results through superior client service, innovative product offerings, and strategic

vision while maintaining the highest standards of fiduciary responsibility. During the review period, the bank will have excelled in co-ordinating complex family structures, governance frameworks, tax optimisation, and other crucial services that have helped to preserve and grow legacy wealth.

**Geographic Levels Awarded at:** Global, regional, and country/territory

**Eligible Entrants:** Private banks or wealth managers

- **Key Performance Indicators:**
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- **Assessment Criteria:**
- Evidence of rising wallet share in family office client segment
- Evidence of sophisticated, bespoke product offering across traditional and alternative assets
- Evidence of sophisticated, multi-jurisdictional wealth planning offering
- Evidence and examples of high-touch, experienced family office RM teams
- Evidence of sophisticated digital delivery models for family office clientele

## **Best for Next-Gen**

The private bank at a global, regional and country/territory level that during the review period proved itself as an exemplary provider of services and engagement for younger family members. Such services may include but are not limited to innovative events and content, digital native technology platforms, and values-driven investment solutions. The winner should be able to demonstrate tangible evidence of helping to develop meaningful connections between next-generation clientele and their family wealth, as well as excellence in creating tailored programmes that bridge generational gaps.

**Geographic Levels Awarded at:** Global, regional, and country/territory

**Eligible Entrants:** Private banks or wealth managers

- **Key Performance Indicators:**

- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

#### Assessment Criteria:

- Evidence of increasing wallet share among next generation clientele
- Examples of sophisticated, effective educational/content programmes for next-gen clients
- Evidence of sophisticated digital delivery models that appeal to next-gen clients
- Evidence of product/solutions that appeal to next-gen clients (e.g. ESG and impact investing)
- Evidence of dedicated teams servicing and prospecting next-gen clientele

#### Best for Succession Planning

The private bank at a global, regional and country/territory level that has excelled in facilitating seamless wealth and business transitions of its clientele from one generation to the next during the period under review. The private bank will also have demonstrated an expertise in complex estate planning, trust structures, family governance and tax efficiency, while also providing education and support for multi-generational wealth preservation. Applicants should be able to showcase their ability to co-ordinate multi-disciplinary teams, navigate multiple jurisdictions and implement sophisticated wealth structures.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio

## Assessment Criteria:

- Examples of success in executing complex family wealth transfers
- Evidence of how succession planning services have led to higher wallet share
- Evidence of sophisticated offering across tax planning, trust, and family governance solutions
- Examples of co-ordination with third-party service providers
- Evidence of dedicated and experienced wealth and succession planning personnel

## **Best for Client Service \*\*NEW\*\***

The private bank at a global, regional and country/territory level that has demonstrated excellence during the period under review in terms of delivering comprehensive client service through personalised relationship management, innovative digital solutions, premium concierge services and exclusive lifestyle benefits. The winning private bank will have consistently exceeded client expectations by providing a seamless, high-touch service across all touch points while maintaining a high level of professionalism.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Assessment Criteria:
- Evidence of client satisfaction in the form of Net Promoter Scores or equivalent
- Evidence of how client satisfaction is leading to increased wallet share
- Examples of comprehensive concierge and lifestyle services
- Evidence of sophisticated digital delivery channels
- Examples and evidence of faster on-boarding and client response times

**Best for Discretionary Portfolio Management**

The private bank at a global, regional and country/territory level that has excelled in providing active investment management services on behalf of its clientele during the review period, through outstanding portfolio construction, risk management, and overall performance. The winning private bank will be able to demonstrate superior investment acumen, robust governance, and sophisticated asset allocation strategies for its clients with a track record for delivering above market returns on a risk-adjusted basis.

**Geographic Levels Awarded at:** Global, regional, and country/territory

**Eligible Entrants:** Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Penetration rate of DPM by total client AUM (%)
- Performance of balanced multi-asset mandate (%)
- Assessment Criteria:
- Evidence of superior investment returns on risk-adjusted basis
- Evidence of successful fund-raising across discretionary mandates
- Evidence of innovative product launches and customisation across asset classes
- Evidence of sophisticated risk management frameworks and monitoring
- Evidence of integration of ESG and sustainability processes

**Best for Alternative Investments**

The private bank at a global, regional and country/territory level that has provided its clients with exceptional access and expertise in alternative asset classes including private equity, private credit, hedge funds, real estate and infrastructure. The winning applicant will be able to demonstrate superior due diligence capabilities, stronger asset management relationships, innovative product structuring, and comprehensive risk management while deliver investment opportunities that boost portfolio diversification and returns.

**Geographic Levels Awarded at: Global, regional, and country/territory**

**Eligible Entrants: Private banks or wealth managers**

- **Key Performance Indicators:**
- **Assets under management (AUM)**
- **Revenue**
- **Net new assets/net new money (NNA/NNM)**
- **Return on assets (ROA)**
- **Cost-to-income ratio**
- **RM Headcount**
- **RM-to-client ratio**
- **Penetration of alternative investments by AUM (%)**
- **NNA into alternative investments**
- 
- **Assessment Criteria:**
- **Evidence of rising wallet share and fundraising across alternative investments**
- **Evidence of exemplary performance across alternative investments on a risk-adjusted basis**
- **Evidence of innovative product launches and customisation across alternatives**
- **Evidence of sophisticated risk management frameworks and monitoring**
- **Evidence of integration of ESG and sustainability processes**

## **Best for Funds**

This award recognises a private bank at a global, regional and country/territory level that has demonstrated excellence in distributing and advising on traditional fixed income and equity funds during the period under review. The winning applicant will have distinguished itself through its comprehensive fund platform capabilities, rigorous fund selection, and its ability to deliver optimal performance to clients on a risk-adjusted basis. The private bank must demonstrate superior research, portfolio construction, client suitability/ongoing monitoring, and strong relationships with leading fund managers.

**Geographic Levels Awarded at: Global, regional and country/territory**

**Eligible Entrants: Private banks or wealth managers**

- **Key Performance Indicators:**
- **Assets under management (AUM)**

- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Penetration of traditional fund products by AUM (%)
- NNA into traditional fund products
- Assessment Criteria:
- Evidence of rising wallet share and fundraising in traditional fund products
- Evidence of exemplary performance across funds on risk-adjusted basis
- Evidence of innovative product launches and customisation across fund products
- Evidence of sophisticated risk management frameworks and monitoring
- Evidence of integration of ESG and sustainability processes

## **Best for Digital Solutions**

This award recognises a private bank at a global, regional and country/territory level that has demonstrated operational excellence in digital transformation across all touchpoints of the client journey during the period under review. The successful applicant will have implemented comprehensive digital capabilities that enhance client experience while maintaining the personalised services that are crucial to private banking. Entrants must showcase leadership in AI adoption, mobile-first platforms, seamless digital onboarding, secure client collaboration tools and robust cybersecurity measures.

**Geographic Levels Awarded at:** Global, regional, and country/territory

**Eligible Entrants:** Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount

- RM-to-client ratio
- Digital platforms adoption rate (%)
- Trades executed via digital platforms (%)
- Assessment Criteria:
- Evidence of a superior mobile and digital platform experience for clients
- Evidence of seamless integration of artificial intelligence to support RMs and clients
- Evidence of advanced, secure digital communications and collaboration
- Evidence of comprehensive and seamless cybersecurity and threat detection architecture
- Evidence of enhanced digital onboarding and know your customer (KYC) processes

## **Best for Digital Assets \*\*NEW\*\***

This award recognises the private bank at a global and regional level that successfully offered comprehensive, compliant and secure digital asset solutions to U/HNWIs during the period under review. The winning applicant will have successfully integrated cryptocurrency and digital asset capabilities across execution, advisory, custody and/or trust solutions while maintaining the highest levels of risk management, cybersecurity and regulatory compliance.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Client digital assets under management/custody (% of AUM)
- Penetration of digital assets (% of client count)
- Assessment Criteria:
- Evidence of rising client exposure to digital assets in terms of advice, execution and custody
- Evidence and examples of successful digital asset-related product launches
- Evidence of comprehensive and robust risk management processes around digital assets

- Evidence of sophisticated digital delivery channels related to digital assets
- Evidence of sophisticated educational content on digital assets for clients and RMs

## **Best Wealthtech \*\*NEW\*\***

This award recognises the robo-advisor or digital wealth management provider at a global, regional and country/territory level that has excelled in providing digital-first, artificial intelligence-enhanced and cost-effective wealth management services for high-net-worth and ultra-high-net-worth clients. The winning entrant will have distinguished itself during the period under review through digital capabilities that augment human advisory services, comprehensive portfolio management tools, seamless user experience, transparent and competitive fee structures, as well as an innovative approach to bridging the gap between traditional private banking and digital convenience.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Robo-advisors and digital wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Assessment Criteria:
- Evidence of rising wallet share and fund raising from U/HNW clients
- Evidence and examples of comprehensive product offering across traditional and alternative assets
- Evidence of sophisticated and technology-driven portfolio management and asset allocation tools
- Evidence of competitive and transparent fee structure
- Evidence of comprehensive and robust risk management and client suitability processes

## **Best for Sustainability**

The private bank at a global, regional and national level that has excelled in comprehensively integrating ESG principles across its investment frameworks, client advisory processes, and

corporate operations. The successful applicant will be able to show demonstrable progress towards environmental and social goals, and maintain robust ESG governance structures while advancing industry sustainability standards. The bank must showcase leadership in ESG screening methodologies, sustainable investment product development, client sustainability preference assessment, and compliance with evolving regulations and frameworks.

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- ESG-integrated AUM (%)
- Proportion of clients holding sustainable investment solutions (%)

Assessment Criteria:

- Successful execution of sustainability strategy as set out by leadership
- Evidence of rising wallet share in ESG-integrated investments
- Evidence of robust and comprehensive ESG screening and reporting processes
- Evidence of comprehensive compliance with evolving ESG frameworks
- Evidence and examples of successful product launches in ESG space

### **Best for Impact Investing \*\*NEW\*\***

The private bank that has excelled at a global and regional level in terms of delivering investment solutions designed to generate measurable positive social and environmental outcomes, alongside financial returns, during the period under review. The successful applicant will be able to demonstrate sophisticated impact investment products, rigorous impact measurement capabilities, and processes for guiding clients towards investment solutions that generate tangible environmental and social outcomes. The private bank must showcase leadership in assisting clients align their investment objectives with their values while maintaining superior investment standards and measurable social impact.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: : Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- AUM in impact investing solutions (%)
- Number of impact investing solutions offered

Assessment Criteria:

- Evidence of rising wallet share and fundraising in impact investments
- Evidence of robust and comprehensive approach for measuring and monitoring impact
- Evidence of delivering superior risk-adjusted financial returns through impact investing
- Evidence and examples of successful product launches in impact investing space
- Evidence of thought leadership in growing impact investing space

### **Best for Equities \*\*NEW\*\***

The private bank at a global, regional and country/territory level that has delivered exceptional cash equity investment opportunities through outstanding research capabilities, actionable investment ideas, and superior trade execution. The successful applicant should be able to demonstrate how timely market insights, competitive pricing and robust liquidity provision have helped deliver outperformance for clients while maintaining a high degree of focus on risk management and client suitability

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)

- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Notional trading value/revenue
- Positive hit rate

#### Assessment Criteria:

- Evidence of risk-adjusted outperformance of cash equity ideas presented to clients
- Evidence of rising trading volumes and revenues associated with cash equities
- Evidence and examples of ground-breaking and thought-provoking equity research
- Evidence of excellence in terms of trade execution, pricing and liquidity
- Evidence of global market access and sophisticated, digital trading tools

#### **Best for Fixed Income \*\*NEW\*\***

The private bank at a global, regional and country/territory level that has delivered exceptional cash bond investment opportunities through outstanding research capabilities, actionable investment ideas, and superior trade execution. The successful applicant should be able to demonstrate how timely market insights, competitive pricing and robust liquidity provision have helped deliver outperformance for clients while maintaining a high degree of focus on risk management and client suitability

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Notional trading value/revenue
- Positive hit rate

Assessment Criteria:

- Evidence of risk-adjusted outperformance of cash bond ideas presented to clients
- Evidence of rising trading volumes and revenues associated with cash bonds
- Evidence and examples of ground-breaking and thought-provoking bond research
- Evidence of excellence in terms of trade execution, pricing and liquidity
- Evidence of global market access and sophisticated, digital trading tools

## **Best for FX \*\*NEW\*\***

The private bank at a global, regional and country/territory level that has delivered exceptional FX trading opportunities through outstanding research capabilities, actionable investment ideas, and superior trade execution. The successful applicant should be able to demonstrate how timely market insights, competitive pricing and robust liquidity provision have helped deliver outperformance for clients while maintaining a high degree of focus on risk management and client suitability

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Notional trading value/revenue
- Positive hit rate

Assessment Criteria:

- Evidence of superior performance of FX ideas presented to clients
- Evidence of rising trading volumes and revenues associated with FX trading
- Evidence and examples of ground-breaking and thought-provoking FX research
- Evidence of excellence in terms of trade execution, pricing and liquidity
- Evidence of global market access and sophisticated, digital trading tools

**Best for Structured Products \*\*NEW\*\***

The private bank at a global, regional and country/territory level that has delivered exceptional structured product investment opportunities across asset classes through outstanding research capabilities, actionable investment ideas, and superior trade execution. The successful applicant should be able to demonstrate how timely market insights, competitive pricing and robust liquidity provision have helped deliver outperformance for clients while maintaining a high degree of focus on risk management and client suitability

Geographic Levels Awarded at: Global, regional, and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Notional trading value
- Positive hit rate

Assessment Criteria:

- Evidence of risk-adjusted outperformance of structured product ideas presented to clients
- Evidence of rising trading volumes and revenues associated with structured
- Evidence and examples of ground-breaking and thought-provoking investment research
- Evidence of excellence in terms of trade execution, pricing and liquidity
- Evidence of global market access and sophisticated, digital trading tools

**Best Chief Investment Office**

The private bank chief investment office at a global, regional and country/territory level that has excelled in delivering the investment frameworks, research-driven asset allocation and portfolio management across asset classes, and sophisticated risk-budgeting that has helped achieve risk-adjusted outperformance for clients. The successful applicant should be able to demonstrate rigorous analytical capabilities, robust portfolio construction, and an efficient approach for translating ideas into actionable investment products.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)
- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Relative return of Strategic Asset Allocation versus benchmark
- Alpha added by Tactical Asset Allocation

Assessment Criteria:

- Evidence of risk-adjusted outperformance of CIO portfolio
- Evidence of successful CIO-aligned products and solutions across asset classes
- Evidence and examples of high-quality research produced by CIO
- Evidence and examples of ESG and sustainability integration
- Evidence of sophisticated integration of digital channels into CIO function

## **Best for Real Estate Financing**

This award recognises a private bank at a global, regional and country/territory level that has demonstrated excellence during the period under review for comprehensive real estate financing solutions for residential and commercial properties to high-net-worth and ultra-high-net-worth clients. The winner will have distinguished itself through sophisticated sourcing capabilities, rigorous client suitability processes, innovative financing structures and superior execution of customised funding solutions. The private bank must showcase expertise in complex transactions and structures, while delivering competitive pricing and maintaining prudent lending standards.

Geographic Levels Awarded at: Global, regional and country/territory

Eligible Entrants: Private banks or wealth managers

- Key Performance Indicators:
- Assets under management (AUM)
- Revenue
- Net new assets/net new money (NNA/NNM)

- Return on assets (ROA)
- Cost-to-income ratio
- RM Headcount
- RM-to-client ratio
- Notional trading value
- Positive hit rate

**Assessment Criteria:**

- Evidence of rising lending volumes in real estate financing space
- Evidence of comprehensive property sourcing capabilities through third-parties
- Evidence of robust client suitability assessment and risk management
- Examples and evidence of innovative financing and structuring capabilities
- Examples of execution excellence for exotic and unique properties

## **Investment Managers**

### **Best Investment Manager - Private Equity \*\*NEW\*\***

This award recognises an investment manager on a global and regional level that has excelled in manufacturing and distributing private equity solutions through private banking and wealth management channels during the period under review. The successful applicant will have built extensive distribution networks among private banks while successfully raising significant capital from U/HNWIs, demonstrating product and channel expertise. The winner's solutions must have provided market-leading performance to end clients on a risk-adjusted basis, and demonstrated innovation in terms of liquidity and structures, and competitive fees.

**Geographic Levels Awarded at: Global and regional**

**Eligible Entrants: Investment managers**

- **Key Performance Indicators:**
- Net inflows from private banks and wealth managers
- Number of private banks and wealth managers distributing products
- **Assessment Criteria:**
- Evidence of rising wallet share among private banks and wealth managers
- Evidence of risk-adjusted outperformance of funds offered through wealth channel
- Evidence and examples of thought leadership and engagement with U/HNWI demographic

- Evidence of investment in resources and infrastructure associated with private wealth channel
- Evidence of innovation when it comes to fund structures, liquidity and fees

## **Best Investment Manager - Private Credit \*\*NEW\*\***

This award recognises an investment manager on a global and regional level that has excelled in manufacturing and distributing private credit solutions through private banking and wealth management channels during the period under review. The successful applicant will have built extensive distribution networks among private banks while successfully raising significant capital from U/HNWIs, demonstrating product and channel expertise. The winner's solutions must have provided market-leading performance to end clients on a risk-adjusted basis, and demonstrated innovation in terms of liquidity and structures, and competitive fees.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Investment managers

- Key Performance Indicators:
- Net inflows from private banks and wealth managers
- Number of private banks and wealth managers distributing products
- Assessment Criteria:
- Evidence of rising wallet share among private banks and wealth managers
- Evidence of risk-adjusted outperformance of funds offered through wealth channel
- Evidence and examples of thought leadership and engagement with U/HNWI demographic
- Evidence of investment in resources and infrastructure associated with private wealth channel
- Evidence of innovation when it comes to fund structures, liquidity and fees

## **Best Investment Manager - Public Equities \*\*NEW\*\***

This award recognises an investment manager on a global and regional level that has excelled in manufacturing and distributing public equity solutions through private banking and wealth management channels during the period under review. The successful applicant will have built extensive distribution networks among private banks while successfully raising significant capital from U/HNWIs, demonstrating product and channel expertise. The winner's solutions must have provided market-leading performance to end clients on a risk-adjusted basis, and demonstrated innovation in terms of liquidity and structures, and competitive fees.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Investment managers

- **Key Performance Indicators:**
- Net inflows from private banks and wealth managers
- Number of private banks and wealth managers distributing products
- **Assessment Criteria:**
- Evidence of rising wallet share among private banks and wealth managers
- Evidence of risk-adjusted outperformance of funds offered through wealth channel
- Evidence and examples of thought leadership and engagement with U/HNWI demographic
- Evidence of investment in resources and infrastructure associated with private wealth channel
- Evidence of innovation when it comes to fund structures, liquidity and fees

## **Best Investment Manager - Fixed Income \*\*NEW\*\***

This award recognises an investment manager on a global and regional level that has excelled in manufacturing and distributing fixed income solutions through private banking and wealth management channels during the period under review. The successful applicant will have built extensive distribution networks among private banks while successfully raising significant capital from U/HNWIs, demonstrating product and channel expertise. The winner's solutions must have provided market-leading performance to end clients on a risk-adjusted basis, and demonstrated innovation in terms of liquidity and structures, and competitive fees.

**Geographic Levels Awarded at:** Global and regional

**Eligible Entrants:** Investment managers

- **Key Performance Indicators:**
- Net inflows from private banks and wealth managers
- Number of private banks and wealth managers distributing products
- **Assessment Criteria:**
- Evidence of rising wallet share among private banks and wealth managers
- Evidence of risk-adjusted outperformance of funds offered through wealth channel
- Evidence and examples of thought leadership and engagement with U/HNWI demographic
- Evidence of investment in resources and infrastructure associated with private wealth channel
- Evidence of innovation when it comes to fund structures, liquidity and fees

## **Technology Providers**

### **Best Technology Provider for Wealth Management**

This award honours a technology vendor at global and regional level that has set a new standard in excellence for delivering solutions to the private banking and wealth management industries during the period under review. The successful applicant will have a clear track record of developing and maintaining strong client relationships in the private wealth space, and demonstrable evidence of how its platform(s) has helped private banks and/or wealth managers to reach their operational objectives. This category will accept nominations from applicants across the private banking technology eco-system, but the winning applicant must be able to show how its solution is having a profound effect on its private wealth clientele.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Technology vendors

- Key Performance Indicators:
- Software revenue growth
- Number of private banking relationships

Assessment Criteria:

- Evidence of rising wallet share among private banks and wealth managers
- Evidence and examples of how technology has helped private banks reach operational objectives
- Evidence of comprehensive technological capabilities across spectrum of wealth management
- Evidence of robust business continuity and cyber security measures
- Evidence and examples of how vendor is at the cutting edge of innovation

### **Best Front Office Solution for Wealth Management **\*\*NEW\*\*****

This award honours a technology vendor at a global level that has set a new standard in excellence for delivering front office technology solutions to the private banking and wealth management industries during the period under review. The successful applicant will have a clear track record of developing and maintaining strong client relationships in the private wealth space, and demonstrable evidence of how its platform(s) has helped private banks and/or wealth managers to reach their operational objectives.

Geographic levels awarded at: Global

Eligible entrants: Technology vendors specialising in portfolio management, communications, and/or client lifecycle management

## Key Performance Indicators:

- Software revenue growth
- Number of private banking relationships

## Assessment Criteria:

- Evidence of rising wallet share among private banks and wealth managers
- Evidence and examples of how technology has helped private banks reach operational objectives
- Evidence of comprehensive technological capabilities across spectrum of wealth management
- Evidence of robust business continuity and cyber security measures
- Evidence and examples of how vendor is at the cutting edge of innovation

## **Best Core Banking Solution for Wealth Management**

This award honours a technology vendor at a global level that has set a new standard in excellence for delivering core banking solutions to the private banking and wealth management industries in the period under review. The successful applicant will have a clear track record of developing and maintaining strong client relationships in the private wealth space, and demonstrable evidence of how its platform(s) has helped private banks and/or wealth managers to reach their operational objectives.

Geographic Levels Awarded at: Global

Eligible Entrants: Technology vendors

- Key Performance Indicators:
- Software revenue growth
- Number of private banking relationships

## Assessment Criteria:

- Evidence of rising wallet share among private banks and wealth managers
- Evidence and examples of how technology has helped private banks reach operational objectives
- Evidence of comprehensive technological capabilities across spectrum of wealth management
- Evidence of robust business continuity and cyber security measures
- Evidence and examples of how vendor is at the cutting edge of innovation

**Best Trading and Execution Solution for Wealth Management \*\*NEW\*\***

This award honours a technology vendor at a global level that has set a new standard in excellence for delivering trading and execution solutions to the private banking and wealth management industries during the period under review. The successful applicant will have a clear track record of developing and maintaining strong client relationships in the private wealth space, and demonstrable evidence of how its platform(s) has helped private banks and/or wealth managers to reach their operational objectives.

Geographic Levels Awarded at: Global

Eligible Entrants: Technology vendors

- Key Performance Indicators:
- Software revenue growth
- Number of private banking relationships
- Assessment Criteria:
- Evidence of rising wallet share among private banks and wealth managers
- Evidence and examples of how technology has helped private banks reach operational objectives
- Evidence of comprehensive technological capabilities across spectrum of wealth management
- Evidence of robust business continuity and cyber security measures
- Evidence and examples of how vendor is at the cutting edge of innovation

**Insurance Providers****Best Insurance Provider for Wealth Management \*\*NEW\*\***

This award honours a life insurance product manufacturer or broker at a global and regional level that has demonstrated excellence in distributing insurance-based wealth planning solutions through the private wealth channel to high-net-worth and ultra-high-net-worth clients during the period under review. The winner will have distinguished itself through innovative product development tailored for wealth planning needs, strong distribution partnerships with the wealth channel, and expertise and support in devising complex structures.

Geographic Levels Awarded at: Global and regional

Eligible Entrants: Life insurance providers and brokers

- Key Performance Indicators:

- Average premium per policy
- U/HNW client renewal rate
- Assessment Criteria:
- Evidence of rising penetration among private banks and wealth managers
- Evidence and examples of product innovation and wealth planning integration
- Evidence and examples of client satisfaction and retention
- Evidence of rising average premium per policy
- Evidence and examples of specialised underwriting capabilities and bespoke policy structuring

# Methodology

## Your Entry

- These awards are your opportunity to showcase your institution's achievements within the review period (1 July 2024 to 30 June 2025). Each entrant should submit via the awards portal by the 31 October 2025.
- In each entry form, there are required financial metrics for your business and the category, in addition to qualitative text boxes. All of these align to the criteria Euromoney will use to evaluate entrants and are crucial to our research process.
- Entrants must validate with evidence any improvements their business has made in terms of operations and products during the period under review. Such evidence includes key metrics related to their business (such as assets under management, net new assets and revenues), as well as key metrics applicable to specific categories (such as penetration rates of product lines and trading volumes of investments).
- Entrants may also attach supporting documentation for their submissions.
- The scoring frameworks used by Euromoney's research team use a matrix that awards more points to those entries that provide the data we have requested.

## Financial Metrics

- Please provide all requested data within the prescribed timeframe and currency (where applicable).
- Euromoney will use this data to benchmark your business against its peers.
- Euromoney will assess your performance based on growth and outright scale of the key metrics you provide. An entrant's strategy will be taken into consideration when evaluating these metrics.
- Incomplete financial disclosures significantly limit the ability of Euromoney research analysts to recognise an applicant's performance - and may be reflected in winner decisions.

## Assessment

- We aim to make the process as transparent as possible.
- Entrants will be assessed by Euromoney's research team (including the Chief Research Officer, the Global Head of Research, the Global Head of Private Banking, the Global Head of Sustainability, and others)
- Entrants will be scored using frameworks specific to each category.
- Your entry and any information collected during an interview and secondary research, in addition to our team's knowledge of the market, will all contribute to your scores.

- **Research analysts will be allocated categories based on experience and knowledge, with more than one analyst assessing each category.**
- **Research analysts may nominate entries for additional award categories if they qualify for recognition in more than one area. We will inform entrants if this is the case with their submission(s).**

# How to Submit

## Entry Portal

All entries should be made through our designated submission portal, linked below.

### [Private Banking Awards 2026 Portal](#)

If you are making a submission for the Private Banking Awards for the first time, you will be asked to create an account. If you made a submission in previous years, you will be able to use the same log-in details.

You can build your entries over the submission window and amend them before submitting by logging into your account.

Entry forms can be accessed through the portal after selecting relevant categories from menus.

## Research Interviews

- As part of the research process, Euromoney encourages all entrants to participate in interviews.
- The interviews are an opportunity to expand on your submission, and to fill in any gaps in the key metrics that are crucial to Euromoney research analysts' decisions on award winners.
- Euromoney encourages the participation of entrants' most senior leadership on the calls.

## Scoring

Euromoney's team of research analysts will score entries using frameworks that align to the criteria for each category. Some examples of the criteria Euromoney uses are:

- Evidence of increase in wallet share among target clientele
- Successful launches of relevant and market-leading investment products and services
- Evidence of commitment to sustainability and ESG
- The scoring frameworks used by Euromoney's research team use a matrix that awards more points to those entries that provide the key metrics and other data we have requested.



**EUROMONEY**  
**PRIVATE BANKING**  
**AWARDS 2026**

All queries related to participation, please contact [Alex Pang](#).

For any questions about the awards research, please contact [Ben Naylor](#).

For any commercial enquiries, please contact [Peter York](#).