



The Banca Investis Group joins forces with Connexia to showcase its unique identity.

The Retex communication and marketing brand has undertaken a co-creation project to define a brand positioning strategy tailored to the banking institution.

Milan, 16 January 2024 — A new corporate mission and an innovative company culture: the **Banca Investis Group**, an independent operator specialising in consulting services for managing and optimising the total assets of businesses and individuals, with a particular focus on *High-Net-Worth Individuals (HNWI)*, has chosen **Connexia** to finalise the definition and creation of the **brand's repositioning strategy**.

The Banca Investis Group is a **unique player in the financial** and banking sphere, set apart by its business philosophy, encompassing private banking and wealth management; SGR Symphonia; M&A activities with Investis Advisory; the more traditional markets segment; and the new **alternative investments** line. One of the key objectives of the current project is to establish a **strong and distinctive brand position** among **internal and external stakeholders**, customers and Group members, defining a unique and innovative **value proposition** that unites the different business lines.

To realise this vision, Connexia's branding strategy team has adopted a participatory method, inspired by the principles of **co-creation**, which involves all the Banca Investis teams: the leadership team, area & competence managers, sales team and bankers.

Through a series of structured individual and group activities, the Connexia branding strategy team supported Banca Investis and its people to **define the value proposition** and brand attributes, focusing on the bank's **value structure** and the ways in which value is generated and returned to stakeholders. They were therefore able to pinpoint the **personality and identity** that best suits the brand's characteristics, establishing a **new communication paradigm** to effectively respond to the current context.



"We are a company with a distinctive business model. We are definitely an exception in the financial sector, and we are particularly proud of the path we are pursuing with the Connexia team. Co-creating our brand positioning strategy was a rare opportunity in this industry, and we loved seeing our bankers get involved over the course of the two-month project. This collaboration really epitomised our approach, which is always based on listening and involvement," explained **Isabella Matera**, Head of Brand Management & Corporate Communication at Banca Investis.

"Banca Investis presents itself as a robust financial institution, which has adopted a modus operandi suited to dynamic and modern markets," noted **Matteo Sbarra**, Connexia's Chief Strategy Officer. *"We set out to shift the focus from the institute's vocation to innovation and transformation by way of a series of activities based on synergistic collaboration with the various company teams. We were able to collect, analyse, process and utilise a wide range of information to build **Banca Investis' brand proposition**. We then consolidated its **purpose, vision, mission, positioning, values and personality** to define an overarching **brand idea** that represents the company. Banca Investis proved to be a very enthusiastic partner, wholehearted committed to defining its corporate identity and culture."*

Credits

Chief Strategy Officer - Sbarra Matteo
Creative & Branding Director - Clio Zippel
Account Director - Maria Mastrolia
Senior Brand Strategist - Chantal Cimmino
Strategic Consulting Director - Jacopo Cattaneo
Senior Copywriter - Gianluca Villa
Innovation Consultant - Leonardo Antinucci
Senior Account Manager - Anna D'Agnano

Connexia

Connexia means creativity.
It means data-driven thinking.
It means excellence in media management.
It means technological innovation.
But that's not all. The Retex communication and marketing agency is above all about passion, ethical commitment, transparency and corporate social responsibility.



CONNEXIA

A RETEX BRAND

It is a multicultural and multidisciplinary team, with professionals who are capable of building and conveying brand values, but also of guiding digital transformation processes.

We devise and develop ideas that can live on all channels, without any fear of being measured by the effectiveness of each campaign.

Expect to work with us in a new way: together, for real, through continuous processes of co-creation and objective-driven experimentation in business and communication. www.connexia.com

RETEX

Retex is the MarTech company that promotes and accelerates connections between brands and stakeholders, supporting companies in the transition towards a new meaning of Retail. It does this through a design approach based on a blend of innovation, technology, data intelligence & automation, creativity, consulting, marketing, and communication. Retex offers integrated services and solutions for the Retail industry, spanning various markets including Consumer Retail, Food & Beverage, Fashion & Luxury, Direct-to-Consumer, as well as having extensive experience in the Chinese market and the Healthcare & Pharma industry.

Founded in 2010, with its headquarters in Milan, Retex operates through 12 branches in Italy, Barcelona, London, and Shanghai. It collaborates with nearly 600 professionals from 32 different nations.

Steadily growing since its creation, Retex closed the year 2022 with 91 million euros in revenues and 9.4 million in EBITDA. www.retexspa.com

Banca Investis

Banca Investis S.p.A. is a bank under Italian law, the parent company of the Banca Investis Group, and an independent and specialised operator whose service model targets *High-Net Worth Individuals (HNWI)* to provide consulting services with high added value, applying a holistic approach to the management and optimisation of the total assets (financial, real, real estate and corporate) of its target customers. www.bancainvestis.com