



FundBox: Redefining Trust and Long-Term Value in Alternative Investments

For more than two decades, FundBox has established itself as one of Portugal's most respected and enduring independent fund managers, recognized for its disciplined investment philosophy, rigorous governance standards, and unwavering commitment to client interests. Built on a foundation of transparency, accountability, and long-term thinking, the firm has consistently navigated market cycles with resilience, earning the trust of institutional and sophisticated private investors alike. Operating across a diversified platform that includes real estate, private equity, and passion investments, FundBox has developed a reputation for delivering measurable, sustainable value through actively managed and carefully structured investment strategies.

FundBox's independence is not merely an organizational characteristic but a defining principle that underpins every aspect of its decision-making. Free from external influence or product-driven incentives, the firm is able to design conflict-free, client-aligned investment solutions tailored to clearly defined objectives and risk profiles. This autonomy enables FundBox to act with agility, maintain objectivity, and prioritize capital preservation alongside growth—an approach that has become increasingly valuable in complex and volatile market environments.

Central to FundBox's philosophy is a strong focus on long-term value creation, supported by deep sector knowledge and a hands-on execution model. The firm actively participates throughout the investment lifecycle, from opportunity sourcing and due diligence to asset management, value enhancement, and exit strategy. A key element of this approach is FundBox's meaningful co-investment alongside its clients, a practice that reinforces trust, demonstrates genuine partnership, and ensures complete alignment of interests. By sharing both risk and reward, FundBox underscores its confidence in its strategies and its commitment to responsible capital stewardship.

Over the years, this disciplined model has enabled FundBox to execute approximately 750 transactions and manage €610 million in assets, with a strong concentration in real estate and private equity. The firm has also played a pioneering role in shaping Portugal's investment landscape, introducing market-first structures such as the country's first property fund with dual unit classes and the first corporate-form property fund. In addition, FundBox has led significant capital market initiatives, including high-profile listings and bond issuances, further reinforcing its standing as an innovator and trusted partner.

FundBox's portfolio of active funds reflects its ability to identify, structure, and manage specialized opportunities with long-term potential. These include Tagilde Capital, with its focus on enterprise technology and innovation-driven growth; Hotel Invest, a long-term hospitality strategy centered on resilient tourism assets; and Coimbra Viva, an urban regeneration initiative dedicated to revitalizing city centers through sustainable development. Each fund is guided by a clear mandate, robust governance, and active oversight, ensuring consistency with FundBox's overarching investment principles.

Designed for experienced investors seeking disciplined, transparent, and sustainable growth, FundBox continues to set the benchmark for integrity-driven fund management. As Portugal's investment landscape evolves, the firm remains committed to innovation, responsible investment, and enduring partnerships—positioning FundBox as a trusted steward of capital for the long term.

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