

CaixaBank re-elected Best Digital Private Bank in Europe by PWM (Financial Times Group)

- ***The British publication has awarded the bank as the “Best Private Banking Institution in Europe for its Communication and Digital Marketing” for the fourth consecutive year.***
- ***The awards jury has recognised CaixaBank Private Banking's commitment to its digital transformation and the use of new technologies to improve the communication of its services and products, with the aim of guaranteeing the best customer experience.***

May 9, 2025

The British magazine [Professional Wealth Management \(PWM\)](#), part of the Financial Times Group, has chosen CaixaBank as the “Best Digital Private Bank in Europe” for the second consecutive year in the latest edition of its Wealth Tech Awards. This award is added to the “Best Private Bank in Europe for Digital Marketing and Communication 2025”, which the financial institution has won for the fourth consecutive year.

For the past eight years, the Wealth Tech Awards have been recognising private banking institutions that stand out for their innovation in wealth management, with a commitment to excellence in the use of technology and digital communication. The jury, made up of leading professionals in the sector, has analysed the strategies, services, and products of institutions worldwide to reward those that contribute most to the digitalisation and modernisation of the sector.

These two new PWM awards recognise CaixaBank Private Banking's commitment to digital transformation and the use of new technologies to improve the communication of its services and products, with the aim of ensuring the best customer experience.

In this regard, the jury has recognised the [launch of GPS](#), a new client management platform for all the bank's private banking managers, which combines CaixaBank's private banking capabilities and technological advances with the strengths of the Aladdin Wealth™ tool, BlackRock's investment management technology that enhances portfolio transparency and efficiency so that advisors can offer personalised solutions to clients.

This platform is the first collaboration between CaixaBank and Aladdin Wealth and is the result of months of work to customise the tool for application in CaixaBank's wealth management area, creating a unique and pioneering ecosystem in the sector in Spain.

The new GPS platform is integrated into the operating systems of CaixaBank's private banking managers, allowing them to have full control of their clients' positions - both independent and non-independent advisory services -, analyse their portfolios, generate investment proposals adapted to their preferences and objectives, and communicate them quickly and efficiently.

Through an intuitive graphical interface, GPS offers multiple competitive advantages over other solutions on the market, such as an aggregated view of the manager's client portfolio by asset allocation, risk and profitability; a greater capacity to carry out in-depth analysis of positions through filters and scenarios; and an enrichment of investment proposals and client monitoring reports.

GPS enables better control of the various risks of portfolios by simulating their behaviour under different scenarios, through indicators and metrics that translate into alerts for the manager, facilitating day-to-day control of each portfolio, reducing his reaction time and speeding up decision-making.

The new platform is also the basis for the new Advisory GPS (Global Portfolio Strategy) service, which combines agility and efficiency in portfolio construction with maximum personalisation of advice. This service is available to all clients in the private banking segment, including Independent Advisory and Wealth, allowing them to decide which part of their portfolio to adhere to, being explicitly paid and accessing clean classes for non-independent service clients and incorporated into the current fee for independent advisory clients.

Advisory GPS gives access to a variety of investment options, allowing clients to choose between Funds and ETFs or Securities. Regardless of the instrument, the client chooses the level of risk they want to take, the type of bias they want to give to that part and, depending on the assets to be allocated, can diversify in alternative assets. Often, the customer receives investment proposals from his manager that seek to align the portfolio with the entity's strategic positioning. And each investment proposal also incorporates the rationale for the proposed changes to the client, strengthening the value for money of the advice, improving the proactivity of the managers and ensuring optimal constancy of the portfolio.

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According to **Belén Martín**, Director of Private Banking at CaixaBank: 'Without a doubt, one of the main challenges facing private banking in the future is technology and the role that artificial intelligence will play in the relationship between the manager and the client. Therefore, at

CaixaBank Private Banking, we are committed to innovation, but always understood as a support for our value proposition, which always puts people at the centre. These international awards recognise the excellence of CaixaBank Private Banking's business model and best practices in this area as well.

Leadership in communication and digital marketing

In digital marketing, CaixaBank Private Banking is a pioneer in digital marketing and communication, integrating cutting-edge strategies with innovative technology. In 2024, the entity has worked on marketing campaigns driven by dynamic creative optimisation, AI-based algorithms and personalised audience segmentation.

Also, in Ocean, the bank's 100% online investment service, a paid media strategy has been implemented with optimised campaigns to maximise the return on every euro invested. Thus, digital contracting of funds and portfolio trading grew 43% year-on-year, demonstrating the bank's ability to stay at the forefront of industry trends.

CaixaBank Private Banking

CaixaBank's private banking model consists of a team of more than 1,200 accredited specialist managers with an average of 15 years' experience and 75 exclusive private banking centres and 11 exclusive Wealth centres, ensuring that clients always receive personalized attention.

This year, CaixaBank was named Best Private Bank in Spain for the third consecutive year at the Global Private Banking Awards of the British magazine [Euromoney](#), which recognises excellence and best practices in international private banking. CaixaBank Private Banking has received Euromoney's top national award seven times since 2015. In addition to this award, the magazine presented CaixaBank Private Banking with two other awards: 'Best Private Bank for High Net Worth Wealth (UHNW) in Spain 2025' and 'Best Private Bank for Family Office Services in Spain 2025', awards that CaixaBank has received for the second year in a row. BPI, a CaixaBank subsidiary, received four awards in Portugal. This brings the CaixaBank Group's total number of awards to seven, its highest ever in these international awards, which have been running for more than 20 years.

CaixaBank Private Banking's value proposition offers different service models to adapt to the needs and preferences of each customer, from those who demand a comprehensive advisory service, whether independent or not, to those who operate on their own initiative in the management of their assets through a platform with global investment capabilities in securities, funds, savings insurance and other management products.