Form CRS (Client Relationship Summary) October 23 2026

Item 1: Introduction

Margna Peak Advisors AG ("MARGNA"), is an investment adviser registered with the U.S. Securities and Exchange Commission as and as such, we provide investment advisory accounts and services. Investment Advisory services and fees differ from brokerage accounts and it is important for you to understand these differences. This document gives you a summary of the types of services we provide to individual retail clients and how you pay for them. Free and simple tools available to research firms and financial professionals at Investor.gov/CRS, which also provides educational materials about broker-dealers, investment advisers and investing.

Item 2: Relationship and Services: What investment services and advice can you provide me?

We offer advice and guidance to retail, high net worth and ultra-high net worth clients and assist you with a strategy designed to achieve your investment goals. We limit the types of investments since not every type of investment vehicle is needed to create an appropriate portfolio.

We offer both "non-discretionary" and "discretionary" advisory services. In a "discretionary" account, you grant us authority to determine the securities or other assets to purchase or sell in your account from time to time on your behalf. In a "non-discretionary" account, you receive investment recommendations upon your request, continuous monitoring of your portfolio and reviews, but you make the decisions about your investments. We generally require a minimum investment amount of USD $1million (for discretionary accounts) and USD $2million (for non-discretionary accounts), unless this is reduced or waived at our discretion.

You receive statements directly from your Custodian Bank generally on a quarterly basis. We monitor your account on an ongoing basis periodically and discuss your portfolio strategy. For additional information about our services, please refer to Items 4 and 7 of our Form ADV Part 2A Disclosure Brochure available at the SEC's website, www.adviserinfo.sec.gov, or by contacting us.

You may ask us: Given my financial situation, should I choose an investment advisory service? Why or why not? How will you choose investments to recommend to me? What is your relevant experience, including your licenses, education and other qualifications? What do these qualifications mean?

Item 3: Fees, Costs, Conflicts and Standard of Conduct: What fees will I pay?

We charge a minimum annual fee that is payable in the reference currency chosen and billed quarterly in arrears (minimum fee of USD 2500 per quarter). Our fees are "asset-based", meaning that the fee is calculated as a percentage of the assets in your advisory account (included uninvested cash). The more assets you invest in your account, the more you will pay in fees, and there is therefore an incentive to encourage you to increase your assets managed by us. When you engage us, you will agree on the fee you pay. In addition, you will generally pay fees related to having a brokerage account at the custodian that holds your assets. These fees typically include custodial fees, brokerage commissions, transaction fees, fees charged by third-party managers, and other transactional or product-level fees.

You will pay fees and costs whether you make or lose money on your investments. Fees and costs will reduce any amount of money you make on your investments over time. Please make sure you understand what fees and costs you are paying.

For additional information about fees and expenses, refer to Item 5 and 12 of our Form ADV Part 2A Disclosure Brochure**.**

You may ask us: Help me understand how these fees and costs might affect my investments. If I give you $10,000 to invest, how much will go to fees and costs, and how much will be invested for me?

What are your legal obligations to me when acting as my investment adviser? How else does your firm make money and what conflicts of interest do you have?

When we act as your investment adviser, we have to act in your best interest and not put our interest ahead of yours. At the same time, the way we make money creates some conflicts with your interests. You should understand and ask us about these conflicts because they can affect the investment advice we provide you. Here are some examples to help you understand what this means.

As noted, we have an incentive to recommend adding assets to any account that we manage because this increases the asset-based fee clients pay us.

We must eliminate conflicts or tell you about them in a way you understand so that you can decide whether or not to agree to them. We do not charge performance-based fees, or offer proprietary products, engage in principal trading, receive third party payments, or have "soft dollar," or revenue sharing arrangements.

For a discussion of any actual or potential conflicts of interest involving our firm, please refer to our Form ADV, Part 2A Brochure Items 10, 11, 12 and 14.

You may ask us: How might your conflicts of interest affect me, and how will you address them?

How do your financial professionals make money?

Our financial professionals do not receive commissions for recommending certain products or services. They receive an annual fixed salary and are eligible to receive a discretionary annual bonus.

Some of our Financial Advisors receive a percentage of the revenue that they generate from our services. Financial Advisors who receive a percentage of the revenue they generate have a conflict of interest because they have a financial incentive to encourage you to maintain an advisory account with us and increase the assets held in your advisory account, as this increases, their compensation.

Item 4: Disciplinary History: Do you or your financial professionals have legal or disciplinary history?

No. There are no legal, regulatory or disciplinary events involving MARGNA, our management team, financial professionals or other employees. Please visit investor.gov/CRS for a free and simple search tool to research us and our financial professionals. You may also refer to the Form ADV Part 2B Brochure Supplements for additional information regarding our financial professional's experience and qualifications.

You may ask us: As a financial professional, do you have any disciplinary history? For what type of conduct?

Item 5: Additional Information

For additional information about our investment advisory services, or to request a copy of our latest Client Relationship Summary or Form ADV Part 2A, please contact our Chief Compliance Officer at info@margnapeak.com or by calling +41 44 253 67 67. You can also find detailed information about us on our website www.margnapeak.com.

You may ask us: Who is my primary contact person? Is he or she a representative of an investment adviser or a broker-dealer? Who can I talk to if I have concerns about how this person is treating me?

Margna Peak Advisors AG

Amended Form CRS (Client Relationship Summary)

Form ADV Part 3

Summary of Material Changes

October 2026

We are required to update the Form CRS whenever there are material changes. Since our last filing, we made editing and formatting changes to more closely conform to the SEC template guidance and to disclose that our employees will receive compensation for client referrals.