

SPEZIAL-PANEL

Fund Selection

Donnerstag, 04. Mai 2023, 12:00 - 12:40 UHR

SEMINARRAUM 5 (MIT VIDEO)

English

Referent(en): Sébastien Gentizon, Anna Obenhuber, Patrick Roefs

Sébastien Gentizon

Head of Fund and Manager Selection, Banque Pictet & Cie SA

Sébastien joined Pictet in 2012. Prior becoming Head of Fund and Manager Research in 2022, Sébastien was a Senior Fund Analyst covering global emerging and Asian managers. He spent four years in Singapore, focusing on Asian managers' research and supported the launch of Pictet Wealth Management's fund advisory unit in Asia. Sébastien started his career at JPMorgan Private Bank before working at Lloyds TSB Bank for seven years in its hedge fund and fixed-income department. He has a Master's of Science in Financial Engineering from the University of Michigan and a Master's degree in Management from HEC Lausanne. Sébastien is a Certified International Investment Analyst and Certified Financial Analyst in ESG Investing.

Anna Obenhuber

Head CIO Global IM Investment Fund Analysis, UBS Global Wealth Management

Anna is a Managing Director at UBS, leading the Investment Fund Analysis team within Global Wealth Management S&I. The team is responsible for the selection and ongoing monitoring of long only mutual funds.

Anna has worked for UBS Global Wealth Management since 2006. She initially joined as an equity fund analyst. She then worked as an analyst focusing on asset allocation principles and behavioral finance, before rejoining the Investment Fund Analysis team in 2010.

Since 2010, Anna's main analyst area of focus is fixed income credit funds. Having covered all rating segments in the past, she today maintains an analyst role for investment grade credit. She leads the Fixed Income Fund Analysis team since 2017 and the Investment Fund Analysis team since February 2021.

Prior to joining UBS Global Wealth Management, Anna worked at Nevastar Finance, an independent financial advisor.

Patrick Roefs

Head Fund Offering, Bank Julius Bär

After graduating from the University of St Gallen with a Master of Arts HSG, Patrick joined Credit Suisse's credit management department. Following a period at Bank von Ernst as a relationship manager in private banking and assistant to the management committee, he joined Julius Baer as a fund analyst in 2001. In 2003, Patrick was promoted to Head Fund Selection for traditional funds. After spending two years in the Product Management team, Patrick returned in 2009 in order to take over responsibility for the selection of traditional and alternative funds. Patrick holds a Certified European Financial Analyst (CEFA) diploma.

Dr. Roman von Ah

Verwaltungsratsdelegierter und Geschäftsleiter der Swiss Rock Asset Management AG, Gründungspartner

Er ist Vorstandsmitglied der Schweizer Finanzanalystenvereinigung SFAA sowie Verwaltungsratspräsident des Ausbildungszentrums für Experten der Kapitalanlage AZEK. Er ist auch Verwaltungsratsmitglied der Pensimo (Immobilien-) Fondsleitung . Er hält an der AZEK seit über zwei Jahrzehnten Vorlesungen in den Bereichen derivative Finanzinstrumente, Bonds, Portfolio- und Wealth Management. Beruflich war er vormals Mitglied der Konzernleitung der grössten Schweizer Privatbank Julius Bär, weltweit verantwortlich für die Division Asset Management. Er hat an der Universität Freiburg Volkswirtschaft studiert (Lic.rer.pol.), berufsbegleitend in Finance promoviert (Dr.rer.pol.) und hat über 200 Artikel zu Anlage- und Finanzmarktthemen publiziert.