

FACHPANEL

Thematic investment solutions in the ESG segment

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SEMINARRAUM 5 (MIT VIDEO)

English

Speaker(s): Michael Haupt, Kenneth Lamont, Dr. René Nicolodi

Presenter: Christian Trixl

What is the current status of thematic implementation in the ESG segment? Which segments (solar, wind, hydro) are trending? What are the investment results? Which strategies have proved successful so far, which have not and why? Where is the trend heading?

Michael Haupt

Head AMCs and Thematic Investment

Michael Haupt ist Head AMCs und Thematic Investment bei Vontobel Wealth Management. Er hat einen Masterabschluss in European Management (M.A.) und absolvierte den Lehrgang zum Certified International Investment Analyst (CIIA). Seit 2010 arbeitet er für die Bank Vontobel AG in verschiedenen Positionen in Zürich und Hong Kong. Michael verantwortet den Vertrieb von Actively Managed Certificates an EAMs in der Schweiz und beschäftigt sich mit der Entwicklung und dem Vertrieb von Thematischen Investments, bei denen Vontobel zu den führenden Anbietern zählt. Thematisches Anlegen setzt auf Zukunftstrends. Mit anderen Worten: Anleger sollten von einigen der grössten Veränderungen der Menschheit profitieren können.

Michael Haupt is Head Thematic Investment and AMCs at Vontobel Wealth Management. He holds a Master's degree in European Management (M.A.) and completed the Certified International Investment Analyst (CIIA) programme. He has worked for Bank Vontobel AG in various positions in Zurich and Hong Kong since 2010. He started his professional career at Partners Group in Zug. Michael is involved in the development and distribution of thematic investments, in which Vontobel is one of the leading providers. Thematic investing focuses on future trends. In other words, investors should be able to profit from some of the biggest changes in human history.

Kenneth Lamont

Senior Analyst, Manager Research

Kenneth Lamont is a Senior Researcher within Morningstar's Manager Research Department. After an extensive career researching passive funds, Kenneth has transitioned to leading Morningstar's research on thematic investments. Kenneth has authored several globally acclaimed research papers such as the Thematic Fund Handbook and The Global Thematic Fund Landscape. He has been the driving force behind high impact research projects, including the Morningstar Thematic Fund Classification System and The Morningstar Thematic Consensus Purity Score for stocks and funds.

Before joining Morningstar in September 2013, Kenneth was a research analyst at Mergermarket, where he covered the infrastructure finance sector and previously an associate at Markit, where he held a role within the portfolio valuations team.

Kenneth is widely regarded as a leading industry expert on both passive and thematic funds and appears frequently as a speaker at conferences and as a commentator in the financial media.

Kenneth holds a Master of Science in Investment, Banking and Finance from the University of Glasgow and an Executive MBA from the Judge Business School at the University of Cambridge. In addition, he holds the Chartered Alternative Investment Analyst® designation.

Dr. René Nicolodi

Head Equities & Themes

René is Head of Equities and Deputy Head at the asset management of Zürcher Kantonalbank. Over the last 20+ years, he has held several positions at Zürcher Kantonalbank and other financial institutions. René is part of the ESG Commission of the European Federation of Financial Analysts Societies (EFFAS) and is the Vice-President of the Board of Swiss Sustainable Finance. Additionally, he is a lecturer on asset management and sustainable finance at different universities. René gained a Ph.D. in the area of 'Sustainable Pension Fund Engagement' from the University of Zurich, and since 2009 he is a Chartered Alternative Investment Analyst (CAIA).

Christian Trixl

CEO, Amundi Schweiz

Christian Trixl joined Amundi in 2019 as Country Manager and CEO of Switzerland responsible for Institutional clients and Distribution and Wealth Management Services.

Before Amundi he worked for 12 years for Columbia Threadneedle Investments as Country Head of Switzerland responsible for Institutional and Wholesale Distribution.

Christian was also named Head of Alternatives Distribution Europe in 2010.

Before joining Columbia Threadneedle, Christian worked at Schroder Investment Management as Executive Director and Head of Sales and Marketing for Swiss Wholesale, Global Financial Swiss Institutions and Institutional Distribution.

He was also a member of the European Product Development Committee and Executive Board of Schroder Investment Management Switzerland.

Prior to this Christian was the Sales and Marketing Director at Bank von Ernst, a Portfolio Manager for Pension Funds at Swiss Cantonal Bank and he started his career with Hill Samuel Ltd working in the Corporate Finance / New Issues Division.

Christian holds a Federal Diploma in Business Economics of the Swiss Business School and various higher Postgraduate Study Degrees in Marketing, Sales, Business Administration and Finance Studies.

Christian is an active member of selected leading Finance Industry Associations.