

The role of Fixed Income in Asset Allocation

Mittwoch, 24. April 2024, 13:00 - 13:40 UHR

English

Moderation: Thomas Breitenmoser CFA

Referent(en): Agim Xhaja Sébastien Zöllner Gilles Dauphiné Andrew Jackson

How can Asset Allocation be optimised with Fixed Income today? Which Fixed Income segments should be favoured today? Which segments are passive and where are active strategies in demand in the current market environment?

Thomas Breitenmoser CFA

CFA, CAIA, Head Investment-Consulting/Controlling, Member of the Executive Board, Complementa

Thomas Breitenmoser studied economy and business administration at the University of Applied Sciences in Zurich and completed the dual degree Executive MBA in Asset and Wealth Management at the University of Lausanne and Carnegie Mellon University (Pittsburgh, USA). He is a CFA and CAIA charterholder and held management positions at Swisscanto/ZKB, JPMorgan Asset Management, Merrill Lynch Investment Managers and Credit Suisse. He was furthermore president of the Foundation Board and the Investment Committee of JPMorgan Chase Suisse Pension Fund.

With his team he calibrates the strategic asset allocation, supports the selection of investment managers, and periodically assesses their performance considering various aspects whilst also actively consulting committees at meetings.

Agim Xhaja

PhD, CIO Fixed Income

A member of our team since 2006, Agim Xhaja is in charge of managing fixed income portfolios and the BCV International Bonds fund. He has 14 years of investment experience. His career began in 2001 with UBS, where he held various positions in the credit risk control and financial research divisions. Mr. Xhaja has a PhD in finance from the International Center for Financial Asset Management and Engineering (now the Swiss Financial Institute) and the University of Lausanne, a master's degree in international economics from the Graduate Institute of International Studies in Geneva, and a degree in mathematics from the University of Tirana.

Sébastien Zöllner

Head Fixed Income

Sébastien Zöllner is Head of Fixed Income in the Asset Management of Zürcher Kantonalbank and has been responsible for active fixed income solutions with his team since 2020. He studied Banking & Finance at the University of St. Gallen and Duke University and is a CFA charterholder. In previous roles, Sébastien Zöllner worked in the fixed income division of Credit Suisse Asset Management and in the trading and capital markets division of Zürcher Kantonalbank.

Gilles Dauphiné

Deputy Head Fixed Income

Gilles Dauphiné is Deputy Head Fixed Income - Chief Investment Officer. Based in Paris, he was appointed to this role in 2021. He is also acting as CIO Credit and supervising Fixed Income Solutions for Financial Institutions



Gilles Dauphine joined Amundi in 2019 as Head of Euro Alpha Fixed Income. Gilles joined from AXA IM where he spent 18 years in various roles, notably as Global Head of Buy & Maintain covering AXA and then non-AXA clients since 2015. Prior to that, he held several roles in the Solutions & Pension space as Head of UK LDI, Head of Pensions & insurance Solutions, including structuring and ETF solutions.

Gilles began his career at CIC as trader 1995, upon the completion of a Master of Science in Engineering from ENSEIRB and a Master degree from ESCP.

Andrew Jackson

Head Fixed Income Boutique

Andrew Jackson joined Vontobel Asset Management in January 2024. He is Head of the Fixed Income Boutique. Prior to joining Vontobel, he was Head of Fixed Income at Credit Suisse Asset Management. Other key positions he held included Head of Fixed Income and Multi Asset at Federated Hermes International, and Chief Investment Officer at Cairn Capital, a specialized fixed-income boutique. His experience as a fixed-income investor spans over two decades, managing assets across the spectrum of fixed income, including corporate and high-yield bonds, and private credit.

Andrew holds a bachelor's degree in mathematics from King's College London and is a chartered accountant.