

FACHPANEL

Private Markets

Mittwoch, 02. April 2025, 13:00 - 13:45 UHR

English

Moderation: Andreas Rothacher

Referent(en): Daniel Maier Tasso Politis

This panel will explore the growing importance of private markets in institutional investment portfolios, particularly within asset classes like private equity, real estate, infrastructure, and private debt. Experts will discuss how these markets are evolving, the opportunities they present for enhanced returns, and how institutional investors can effectively integrate them into their broader strategies. Key topics will include accessibility, liquidity, and innovation in private markets, as well as the potential benefits of incorporating these assets for diversification, risk mitigation, and long-term portfolio growth.

Andreas Rothacher

CFA, CAIA, Senior Investment-Consultant, Leiter Investment-Research, Complementa

Andreas Rothacher ist Mitglied des Führungsteams der Complementa AG und betreut institutionelle Anleger in der Planung und Überwachung der Anlagen. Er hat Betriebswirtschaftslehre sowie Rechnungslegung und Finanzen an der Universität St. Gallen studiert und absolvierte ein Studienprogramm an der Carlson School of Management (Minnesota, USA). Berufserfahrung sammelte er bei UBS, Credit Suisse sowie einem Family Office in den Fachbereichen Controlling, Due Diligence und Performance Monitoring.

Er ist Co-Autor der Complementa Pensionskassen-Studie, veröffentlicht Fachartikel und nimmt als Anlageexperte an Diskussionsrunden teil. Er ist Mitglied des Swiss Pensions Conference Committee (Zürich) der CFA Society Switzerland und Chapter Executive bei CAIA Switzerland (Zurich Chapter).

Daniel Maier

CEO und Co-Founder, Chartered Investment Germany GmbH

Daniel Maier is the Managing Director and Co-Founder of Chartered Investment Germany GmbH. With over 20 years of experience in the financial industry, he specializes in developing access products that enable institutional investors to tap into new asset classes. His focus is on transforming complex investment ideas into practical solutions and bridging the gap between traditional and digital financial markets. Early on, Daniel recognized the potential of blockchain technology and became a pioneer in the tokenization of bonds and other financial instruments.

Before founding Chartered Investment in 2013, Daniel held key positions at renowned financial institutions, including WestLB and HSBC Trinkaus & Burkhardt. He earned his degree in Business Administration from the University of Passau.

As a member of several boards, Daniel leads strategic initiatives and oversees innovative projects in the field of alternative investments. His expertise spans both public and private market assets, with a keen insight into the successful structuring and implementation of new financial solutions.

At FINANZ'25, Daniel will provide insights into the opportunities and challenges of private market assets and demonstrate how this asset class is transforming institutional investment.

Tasso Politis

Vizepräsident, Vermögensverwaltung, Ancala

He joined Ancala in 2020 and has more than 10 years' experience in transaction advisory and industry. Tasso sits on the boards of portfolios companies.

Prior to joining Ancala, Tasso was part of EY's transaction advisory team in London focusing on the infrastructure sector. Before that, he worked at Siemens and ThyssenKrupp in Germany and Brazil. Tasso has a BA from the University of Essen and an MBA from the University of Oxford.

About Ancala:

Mid 2024 Vontobel completed the acquisition of a minority stake in Ancala; this transaction expands Vontobel's investment expertise.

Ancala is a leading infrastructure manager with total assets under management of more than EUR 4.1 billion and manages 18 assets operating in essential infrastructure sectors including renewables and energy transition, transport, utilities, and the circular economy. Ancala has deployed a consistent strategy since it was founded in 2010, delivering enhanced returns from investments with traditional infrastructure characteristics.

Ancala's differentiated approach focuses on sourcing bilateral investment opportunities, providing downside protection, inflation-linkage and cash yield, and delivering a unique approach to creating sustainable value within its portfolio companies.