

Opportunities and risks of indexing

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English

Presenter: Stephan Meier

Speaker(s): Robert Edwards Urs Von Gunten Marcel Wagner Dr. Christian Bahr

Where are we today in the implementation of indexed investment solutions? What are the limitations? What do investors need to consider other than pricing? Where is the trend going?

Stephan Meier

CEO

Stephan Meier is a co-founder and the CEO of OpenFunds Investment Services AG, a financial boutique active in fund distribution. He has 36 years of investment experience and started his career as equity research analyst in 1987 at former Swiss Bank Corporation. In the nineties, Stephan and his team managed all Swiss Equity Assets for UBS Asset Management. Stephan moved to smaller banks in the mid 2000, working as CEO for Bellevue Asset Management and later Clariden Leu Asset Management. Stephan holds a Masters in Economics from the University of Basle. He is a Board Member of the Swiss Financial Analyst Association and AZEK.

Robert Edwards

CFA, Director of Product Management

Robert Edwards, CFA, is Director of Product Management – EMEA & ESG Indexes on the Morningstar Index team based in London, where he leads Morningstar's ESG and European-based Index initiatives. He has spent the last five years launching and supporting the creation of new Index products. Previously, Robert spent four years working on the company's institutional research platform, Morningstar Direct. Before Morningstar, he spent three years working at Keyence Corporation, a global factory automation firm. Robert holds a bachelor's degree in finance and marketing from Ohio University in Athens, Ohio. He also holds the Chartered Financial Analyst® designation and is a member of the CFA Society UK.

Urs Von Gunten

Head of Index Fund Investments

Urs von Gunten has been an index fund manager for 28 years and is a recognized expert in the field, particularly in equity index funds. He began his career as a securities trader at the Basel Stock Exchange, where he handled trade execution for the very first Swiss equity index fund. In 1995, he joined UBS as a manager of funds, ETFs, and index-based investment agreements covering Swiss and international equities. He went on to head the teams responsible for those asset classes at UBS for 12 years. In November 2023, he joined BCV's Zurich office as head of index fund investments. Having worked in index funds since this investment approach first appeared in Switzerland, Urs brings with him a long track record, an extensive partner network, and a wealth of knowledge in the field. He is a graduate of the Aarau School of Management.

Marcel Wagner

Head Product Specialist Index Solutions

Marcel Wagner is Head of Product Specialist Index Solutions at the asset management of Zürcher Kantonalbank. Before joining Zürcher Kantonalbank in September 2018, he worked since 2005 in various roles in portfolio management and product

management at Credit Suisse. Since 2012 he was Head Investment Management Index Mandates and Head Tracker Selection for all discretionary solutions in investment management. From 2008 to 2012 he was senior portfolio manager for traditional and index-based mandates. Marcel Wagner completed his studies in economics at the University of St. Gallen (lic.oec.HSG). He is a Certified International Investment Analyst (CIIA) and a Chartered Alternative Investment Analyst (CAIA).

Christian Bahr

Head Index Services

As Head Index Services he is responsible for the Index Business at SIX and its well-known indices for Switzerland (SIX Swiss Exchange), Spain (BME) and the Nordics: the Swiss SMI, the Spanish IBEX 35 of BME, the Swiss Bond Indices (SBI), SARON and the SIXRX for Sweden. He also chairs the index commissions of SIX.

He has broad-based expertise in passive investments and indices as well as many years of experience in the market data business. Christian Bahr is part of the National Working Group (NWG) on Swiss Franc Reference Rates for the transition from CHF-LIBOR to SARON.

Previously, he was responsible for product development, financial engineering and index management in his roles at STOXX (Deutsche Börse) and the Dow Jones Indexes. Christian Bahr holds a Masters and Ph.D. degree from the University of Hanover in Economics and Management.