

FACHPANEL

Social Investing/Engagement: what to watch out for?

Mittwoch, 27. April 2022, 16:00 - 16:40 UHR

SEMINARRAUM 2 (MIT VIDEO)

English

Referent(en): Claire Ahlborn, Lydia Haueter, Benjamin Kelly, Louis Stevens

Claire Ahlborn

Engagement Specialist, Robeco

Claire Ahlborn is Engagement Specialist at Robeco with a focus on social topics. Prior to starting her career at Robeco in 2021, she obtained a Master's in Business Management from Erasmus University Rotterdam and a Bachelor's in Economics from the University of Sussex.

Lydia Haueter

Senior Investment Manager Thematic Equities, Pictet Asset Management

Lydia Haueter joined Pictet Asset Management in 2016 and is a Senior Investment Manager in the Thematic Equities team. She also took on the Product Specialist function for Biotech and Health in 2019.

Lydia began her investment career in 2011 at Bellevue Asset Management as part of the portfolio management team, where she was responsible for several portfolio holdings of BB Biotech AG.

Lydia graduated 2011 with a Master of Science in Systems Biology from ETH Zürich with distinction and she is Chartered Financial Analyst (CFA) charterholder.

Benjamin Kelly

Director of ESG and Impact, Columbia Threadneedle Investments

Benjamin Kelly is a Senior Portfolio Impact and ESG Analyst at Columbia Threadneedle Investments. Ben leads on thematic research and idea generation for the impact strategies within fixed income, which includes social bond analysis from an impact and ESG perspective. In addition, Ben leads the firm's insight generation in behavioural science and provides insights to the investment teams regarding biases in investment decision making.

Previously, Ben was a senior thematic analyst within the Responsible Investment team covering green mobility and infrastructure. Within this role he led the sustainability research and asset improvement for the Threadneedle European Sustainable Infrastructure strategy.

Prior to joining the company, Ben worked in BlackRock's Investment Institute where he combined macroeconomic research across equity, fixed income and real asset teams with expertise in behavioural finance and investment decision making. In this context, he worked with fundamental and quantitative alpha generation teams focusing on their investment processes and how these can be modified to combat behavioural biases.

Ben is a visiting lecturer in behavioural science at the University of St. Andrews, London School of Economics and Warwick Business School.

He holds a BSc (Hons) in Chemistry, an M.Litt in Management, Economics and International Relations and a PhD in Behavioural Economics, all from the University of St Andrews.

Company start date: 2017

Industry start date: 2007

Louis Stevens

Head of Sustainable Product, Liontrust

Louis is responsible for distributing the Liontrust Sustainable Investment proposition in the UK and Europe. Prior to joining Liontrust, Louis was at Alliance Trust Investments (ATI) and had been Head of Sales since 2015, focused exclusively on the distribution of sustainable funds. His experience includes the launch and development of sustainable funds across a range of asset classes, and expanding the ATI offering to both institutional and wholesale clients across Europe.

Louis has an MSc in International Business Studies from the University of Manchester, also studying at the Tecnológico de Monterrey and Universidad de Pamplona. He holds the CFA Society of the UK Investment Management Certificate.

Herr Christian Trixl

CEO, Amundi Schweiz

Christian Trixl joined Amundi in 2019 as Country Head of Switzerland responsible for Institutional clients and Distribution. Before he worked for 12 years for Columbia Threadneedle Investments, most recently as Head of Switzerland responsible for Institutional and Wholesale Distribution. Christian was also named as Head of Absolute Return Distribution, Europe in 2010.

Before joining 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 a member of selected leading Finance Industry Associations.