
# GIS 2018 Geneva

**November 15th 2018**
**Beau Rivage Hotel**

## Global Investment Solutions Conference

### Speakers

**Philipp Lisibach**
Head of Emerging Markets Strategy
**Credit Suisse**

**Paul Donovan**
Global Chief Economist
Member of Global Investment Committee
**UBS Wealth Management**

**Pierre-André Montjovet**
Deputy CEO
Head of Advisory M&A
**Banque Profil de Gestion SA**

**Stéphane Monier**
Chief Investment Officer
(Private Bank)
**Banque Lombard Odier & Cie SA**

**Jean-Sébastien Lassonde**
CEO, Asset & Wealth Management
**PWC Switzerland**

### Partners

AllianceBernstein
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# Investment Outlook Panel Discussion

**Philipp Lisibach**
Head of Emerging Markets Strategy
**Credit Suisse**

Philipp Lisibach is a Director and Senior Investment Strategist in the CIO Office of the Credit Suisse International Wealth Management (IWM) division, based in Zurich. As the Head of Emerging Market Strategy he is responsible for the development of the investment strategies across asset classes.

From 2007 until 2016, Mr. Lisibach was based in New York where his latest role was Investment Strategist in the CIO Office for the Americas and Deputy of the regional CIO with a focus on US and Latin American clients.

Mr. Lisibach moved to New York when he became the Head of US Equity Research for Credit Suisse Private Banking, where he was managing the fundamental research coverage of US and Latin American companies, as well as the US Equity Strategy and coordinating inputs into global publications and research initiatives.

**Paul Donovan**
Global Chief Economist
Member of Global Investment Committee
**UBS Wealth Management**

Paul joined UBS Wealth Management in August 2016, and is the Global Chief Economist. He is a member of the Global Investment Committee, a UBS Opinion Leader, a sponsor of UBS Speak Up and a UBS Pride Ally. Paul is responsible for developing and presenting the UBS economic outlook, marketing the UBS view on economics, policy and politics around the world. He regularly appears in the print and broadcast media. Paul started at UBS Investment Bank as an intern in 1992, and was Global Economist. Paul has an MA in Philosophy, Politics and Economics from Oxford University.

**Pierre-André Montjovet**
Deputy CEO
Head of Advisory M&A
**Banque Profil de Gestion SA**

After gaining his initial international experience at a European transport and logistics company, Pierre-André Montjovet started working in 2002 at LVMH in Paris and London, where he managed and implemented supply chain processes and projects for many of the group's subsidiaries. In 2004, he joined Altran, an expert in innovation and advanced engineering consulting, where he worked as a consultant before becoming director. Specialising in everything relating to the organisation, operations, financing and finances of a business, Pierre-André Montjovet took over the management of Archer Daniels Midland International's mergers and acquisitions teams in 2008 before becoming head of the group's new profit centre. In 2016, he joined Banque Profil de Gestion as head of the M&A and business consulting activities.

**Stéphane Monier**
Chief Investment Officer
(Private Bank)
**Banque Lombard Odier & Cie SA**

Stéphane joined Lombard Odier in July 2009 as Global Head of Fixed Income and Currencies for Lombard Odier Investment Managers, the asset management business of the Group, where he also held the position of Deputy Chief Investment Officer from July 2012. He moved to the private banking business in July 2013 as Head of Investments within the Europe private bank before being appointed Head of Investments in August 2015.

Stéphane is a Chartered Financial Analyst and holds a Master's Degree in International Finance from HEC Paris, as well as an Engineering Degree from AgroTech Paris.

## Closing Presentation

**Jean-Sébastien Lassonde**
CEO, Asset & Wealth Management
**PWC Switzerland**

Jean-Sébastien is the leader of PwC Switzerland Asset & Wealth Management practice and has over 19 years of experience in serving clients in the Asset & Wealth Management industry. Jean-Sébastien is a subject matter expert for Wealth Management and Asset Management where he became an expert for investment advisory and portfolio management front-to-end business processes and controls on a wide range of clients. Jean-Sébastien is a graduate of HEC Montreal and qualified Chartered Public Accountant (CPA) in Canada. He is also a US Certified Public Accountant (CPA), an Associate Chartered Accountant in the UK (ACA), a Chartered Financial Analyst (CFA) and a Chartered Alternative Investment Analyst (CAIA).

# Roundtable Presentations

**Investments in US mortgage: history repeating or attractive opportunity?**

In 2007, the U.S. economy entered a mortgage crisis that caused panic and financial turmoil around the world. After ten years those days are still fresh in people's minds and those memories put a stigma on investments in mortgage backed securities. Since then, the U.S. housing market has significantly improved and the housing prices have increased. Is it time to forget the sins of the past and look at this market with fresh eyes? Flavio Carpenzano will discuss risk and opportunities of this heterogenous market which still offers an attractive yield and ample room for active management.

**Flavio Carpenzano**
*Senior Portfolio Manager-Fixed Income*
**AllianceBernstein**

**Sustainable Investing: Adding values to investments**

Investors seek to align their investment practices with the broader sustainable objectives. The resulting notion of Sustainable Investing has an aspirational set of principles which includes a wide array of possibilities to incorporate Environmental, Social and Governance (ESG) criteria into the investment framework. By integrating ESG factors, the objective is to better manage risks but also to generate more sustainable, long-term returns. We will cover a number of key sustainability topics, including:

- Latest developments in the ESG Research
- Performance
- ESG and Factor Investing
- Sustainable Fixed Income
- Specialties in the SI area
- Implementing Sustainable Investments with Passive

**Raimund Müller, CIIA**
*Head Passive & ETF Specialist Sales Switzerland & Liechtenstein*
**UBS**

**Enabling Exponentials: Infrastructure for Innovation**

The internet continues to radically transform our lives and impacts many aspects of human life and business today. First Trust feels blockchain technology has the potential to change the world's technological infrastructure and have as much impact as the internet did in the 1990's and continues to do.

First Trust has been on the cutting edge of Thematic ETF solutions for our clients. Gregg's presentation will talk through the power of thematic investing, the future potential of the blockchain and our newest transformational technology blockchain and internet UCITS ETFs.

**Gregg Guerin**
*Senior Product Specialist*
**First Trust Global Portfolios**

**The New Capital Swiss Select Equity Fund**

Urs Beck has been running the New Capital Swiss Select Equity Fund since its inception in March 2014, following 8 years at ZKB as the head of Swiss Equities and the PM of ZKB Aktien Schweiz aktiv SPI.
Urs has been working closely with Swiss companies for the last 20 years.
His knowledge, relationships and access to Swiss companies and their senior management, allows Urs to truly get under the skin of a company.
At New Capital he is able to freely express his convictions and to have an active share of close to 80% of the benchmark.
Urs is an award-winning portfolio manager by FERI and the Fund has a Gold Citywire rating.

**Urs Beck**
*Lead Portfolio Manager*
**EFG**

**Looking beyond traditional boundaries to capture the growth in Emerging Market Equities**

Capital Group has been a pioneer in EM investing since the 1980's and launched the New World strategy in 1999. The strategy focuses on the growth in developing economies from a multidimensional, global perspective – combining local EM businesses along with global multinationals that have significant exposure to developing economies. We believe this can offer investors a more resilient way to capture the potential of emerging market investing whilst delivering a lower volatility of returns.

**Julie Dickson**
*Equity Investment Director*
**Capital Group**