GIPS® STANDARDS DAY 2026

Global Investment Performance Standards

25 November 2026 · Metropol Zurich

ASSET MANAGEMENT ASSOCIATION

CFA Society Switzerland

DETAILED PROGRAM

PART I

Knowledge transfer: GIPS standards for beginners & intermediate practitioners

8:45 am – 3:45 pm

Part I provides an introduction to GIPS compliance, covering the institutional framework, performance and risk measurement, and practical application in daily business. Access to **Part II is included**. CFA Society Switzerland has determined that this event qualifies for **5 PL credits.**

CHF 250

PART II

Artificial intelligence in performance reporting

4:00 pm – 7:00 pm

Part II is also available as a standalone session and provides a strategic update on recent GIPS standards developments, followed by a panel discussion on artificial intelligence in performance reporting. The session is designed for professionals working with the GIPS standards at all levels of experience.

CHF 100



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Part I

Knowledge transfer: GIPS standards for beginners & intermediate practitioners

8:45 am	**Registration of participants**
9:00 am	**Welcome** Thomas Egger, UBS Switzerland AG, Chairman of the GIPS Expert Group Switzerland Katharina Koenz, Asset Management Association Switzerland
9:15 am	**Fundamentals of GIPS compliance / composite and pooled fund administration** Jenny Tse-Ong, Ernst & Young, Member of the GIPS Expert Group Switzerland, CIPM Holder
10:15 am	**Input data** Dimitri Senik, PwC, Member of the GIPS Expert Group Switzerland, Member of the GIPS Technical Committee of CFA Institute
11:15 am	**Coffee break**
11:30 am	**Portfolio and composite performance measurement** Dimitri Senik, PwC, Member of the GIPS Expert Group Switzerland, Member of the GIPS Technical Committee of CFA Institute
12:30 pm	**Flying lunch**
1:30 pm	**Composite and pooled fund risk measurement** Dimitri Senik, PwC, Member of the GIPS Expert Group Switzerland, Member of the GIPS Technical Committee of CFA Institute
2:30 pm	**Coffee break**
2:45 pm	**Composite and pooled fund reporting** Jenny Tse-Ong, Ernst & Young, Member of the GIPS Expert Group Switzerland, CIPM Holder
3:15 pm	**GIPS compliance process / quality assurance** Thomas Egger, UBS Switzerland AG, Chairman of the GIPS Expert Group Switzerland
3:45 pm	**End of Part I**

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Part II

Artificial intelligence in performance reporting

3:45 pm		**Coffee break and registration for Part II participants**
4:00 pm		**Welcome** Adrian Schatzmann, CEO, Asset Management Association Switzerland
4:05 pm		**Key changes, recent developments and strategic update** Dimitri Senik, PwC, Member of the GIPS Expert Group Switzerland, Member of the GIPS Technical Committee of CFA Institute
4:15 pm		**Panel discussion: Artificial intelligence in performance reporting** **Moderator:** Dimitri Senik, PwC, Member of the GIPS Expert Group Switzerland, Member of the GIPS Technical Committee of CFA Institute **Participants:** Markus Titze, Confluence, Enterprise Sales Director DACH Region Prof. Dr. Gianluca De Nard, Head of Systematic Strategies, ZKB Asset Management René Rich, LGT Capital Partners Thomas Egger, UBS Switzerland AG, Chairman of the GIPS Expert Group Switzerland
5:15 pm		**Closing remarks** Katharina Koenz, Asset Management Association Switzerland
5:30 pm		**Apéro riche**
7:00 pm		**End of the event**

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Administrative details

TARGET AUDIENCE

The GIPS standards Day is aimed at professionals working for asset managers, banks and other financial intermediaries, particularly those working in the following areas, as well as representatives of industry organizations:

GIPS standards office • performance measurement • risk reporting • risk management • risk control • investment advisory • legal & compliance • internal audit • public policy / government affairs • client advisors • marketing (asset management, private banking) • asset managers • audit firms • consultants • pension funds • trusts • family offices • software providers • securities dealers

LOCATION

Metropol Zurich, Fraumünsterstrasse 12, 8001 Zurich

LANGUAGE

The working language will be English. No simultaneous interpretation will be provided.

DOCUMENTATION

Event documentation will be provided online.

PROGRAM CHANGES

This is a preliminary program and may be subject to change.

CONTACT

Secretariat GIPS standards
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CANCELLATIONS

Cancellations must be submitted in writing to:
office@am-switzerland.ch

by 17 November 2026

Cancellations received after this date will not be eligible for a refund.
Thank you for your understanding.

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Registration & fees

REGISTRATION

Please register for the seminar via the Asset Management Association Switzerland's website: www.am-switzerland.ch

REGISTRATION DEADLINE

17 November 2026

APPLICATION FOR CFA INSTITUTE PL CREDITS

As a participant in the CFA Institute Approved-Provider Program, CFA Society Switzerland has determined that this event qualifies for 5 PL credits. If you are a CFA Institute member and attend the event, please register the credits using the online tool: https://cpd.cfainstitute.org/membermember/becomemember?event=Login.

Parts I & II	Part II only
CHF 250	**CHF 100**
Members and non-members	Members and non-members

DETAILED PROGRAM