

Quarterly Review

Q2 2025 Edition

Dear CFA Society Switzerland Community,

Q2 2025 has been a particularly vibrant and inspiring quarter for CFA Society Switzerland. With a rich mix of thought leadership, member engagement, and community growth, we're proud to look back on several standout moments.

Our **ESG Conference** in **Zurich** brought together over 150 professionals to explore the latest developments in sustainable investing, underscoring that ESG is now central to fiduciary responsibility. Equally impactful was the **Swiss Pensions Conference** in **Lausanne**, where experts and policymakers engaged in deep discussions on geopolitics, AI, and the future of pension systems.

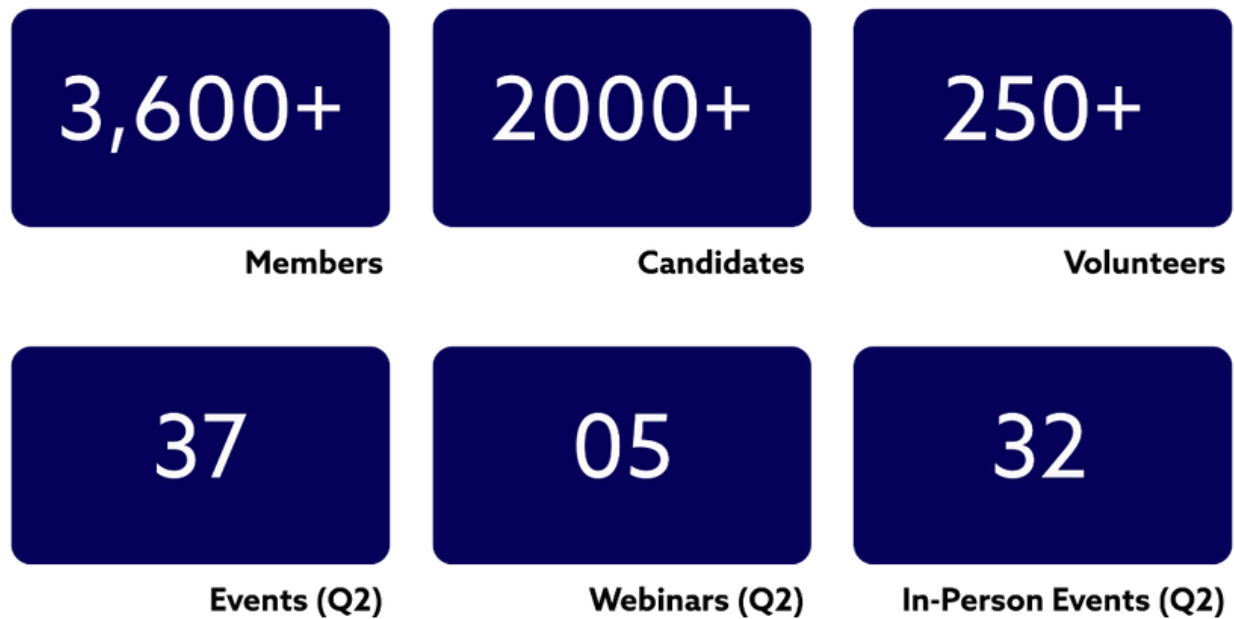
At **Finanzmesse 2025**, we hosted a dynamic panel on **Generative AI in Investment Management**, offering forward-looking perspectives on how technology is transforming our field. On the cultural side, members enjoyed a **guided art tour** of the **Swiss Re Collection** and joined **Breitling's 140th anniversary celebration**, blending finance, heritage, and innovation in truly memorable settings.

Another major milestone was the **successful launch** of our **Career Mentoring Program 2025** in both Zurich and Geneva, connecting emerging professionals with experienced leaders to foster growth and community.

A highlight from our university collaborations: **the Université de Neuchâtel team** advanced to the **global final** of the **CFA Institute Research Challenge**, proudly representing the EMEA region.

Several of our events reached full capacity, reflecting the continued relevance of our topics and the strong engagement within our member community. We're truly grateful for your ongoing support in helping make this past quarter both exciting and meaningful.

We count...



In-Person Events

Finanz'25

On **02-03 April**, CFA Society Switzerland participated in Finanz'25, Switzerland's leading financial fair. Engaging with industry professionals, aspiring finance talents, and key stakeholders, our team showcased the Society's initiatives, educational offerings, and member benefits. It was a valuable opportunity to deepen connections, exchange forward-thinking ideas, and reaffirm our shared commitment to upholding the highest ethical and professional standards within the Swiss financial community.



The event featured two dynamic panel discussions:

"The Future of the Investment Industry" with Dr. oec. Publ. Jakob Schaad, Partner, LINDEMANN LAW AG | Dr. Christoph Künzle, CFA, Senior Lecturer, ZHAW School of Management and Law | Cyrill Moser, CFA, Partner & Head of Provider Management, Zwei Wealth. The panel was moderated by Mirjana Wojtal, PhD, CEO, CFA Society Switzerland.

"Generative AI in Investment Management" featuring Dr. Daniel Seiler, CEO, Eqitron and Gabriele Susinno, Ph.D, Senior Client Portfolio Manager, Pictet Asset Management, explored how generative AI is reshaping investment management - both as a disruptive innovation and a tool for enhancing established quantitative strategies. From real-time data processing to uncovering new sources of alpha, the panel highlighted the evolving collaboration between AI and human expertise. The panel was moderated by Szymon Hennel, CFA, Independent Tech Consultant and Adrian Pusz, CFA, Pictet Asset Management.

A sincere thank you to our speakers for sharing their insights - both sessions shed valuable light on the transformative trends shaping our industry.



The Art of Negotiation – Exclusive Soft Skills Workshop

On **02 April**, CFA Society Switzerland's Careers Committee successfully launched its new **Soft Skills Initiative** with an engaging workshop on Negotiation - one of the most essential competencies in today's professional landscape.

Led by David Hughes, Director Consulting, Schraner Negotiation Institute,

the interactive session equipped participants with actionable strategies, case studies, and practical insights into mastering negotiation - whether in salary discussions, M&A transactions, or supplier agreements. Held in an exclusive small-group format, the workshop encouraged active participation and personalized learning.

We thank all attendees for contributing to a successful kickoff and look forward to continuing this impactful series - empowering members to grow not only as finance professionals, but also as confident, well-rounded leaders.



Infrastructure Investing: Leading the Way Forward

On **06 May** in **Zurich**, CFA Society Switzerland, together with CAIA Association Switzerland, hosted "Infrastructure Investing - Leading the Way Forward", drawing over 100 professionals. Held in Swiss Life Asset Managers auditorium, the panel explored how to build diversified infrastructure portfolios, the importance of long-term due diligence, and the role of education in this evolving asset class.

We thank our expert panelists - Christian Jost, CFA, Senior Investment Analyst, Zurich Invest AG | Gianfranco Saladino, Head of Value-Add Infrastructure, Swiss Life Asset Managers | Marianne Fassbind, President of the Investment Committee, Pensionskasse der Stadt Winterthur | Thomas Breitenmoser, CFA, CAIA, Head of Investment-Controlling/Consulting, Complementa AG - and moderator Andreas Rothacher, CFA, CAIA, Head of Investment Research, Complementa AG, for their valuable contributions.



On **22 May** in **Geneva**, CFA Society Switzerland and CAIA Association Switzerland continued the conversation with a panel focused on value-add strategies in infrastructure investing. Speakers highlighted the asset class's future role in energy transition and portfolio diversification.

We thank our expert panelists Leigh Hazelton, CFA, CAIA, Principal, Real Assets Investments, Hamilton Lane | Charlotte Dewynter, Head of Infrastructure, Private Markets Group, UBP | Jorge Ruiz del Vizo, Treasurer Board of Directors | Geneva Energy Forum, and moderator Maylix Brianto, CAIA, MBA, CESGA, MCSI, Portfolio Manager, Apricus Finance, for sharing their insights, and to all attendees for a dynamic and thoughtful discussion.



Investment Opportunities in Public and Private Fixed Income

On **08 May**, CFA Society Switzerland hosted an exclusive investor-focused event, kindly sponsored by Nuveen, a TIAA company, to explore fixed income opportunities in a changing macroeconomic and interest rate environment. Amid evolving market dynamics, panelists discussed how investors are adapting strategies across public and private credit to seek yield, resilience, and diversification.

We extend our sincere gratitude to our distinguished panelists for their valuable contributions: Gene Miao, Senior Investment Strategist, Churchill Asset Management | Marc Schreier, CFA, CAIA, CESGA, Senior Manager & Fund Selection Specialist, Helvetia Insurance Switzerland | Marcus Maier-Krug, Partner, Arcmont Asset Management | Nicholas Travaglino, Portfolio Manager, Nuveen, a TIAA company | Dr. Oliver Grimm, CFA, Head of Mandates, Investment Team, Pensionskasse Stadt Zürich | Roman Mayer, CFA, Head Fund Advisory, Union Bancaire Privée | Wen-Fu Wu, Deputy CIO and Head of Fixed Income, General Account at TIAA.

We also thank our moderators for leading such thought-provoking and insightful panel discussions: Laura Cooper, Head of Macro Credit and Global Investment Strategist, Nuveen, a TIAA company | Tony Appiah, CFA, Client Portfolio Manager, Nuveen, a TIAA company.

A heartfelt thank you to our sponsor Nuveen, a TIAA company, for the precious support in the organization of the event.



Swiss Pensions Conference Romandie

On **14 May**, CFA Society Switzerland hosted the Swiss Pensions Conference Romandie at the Royal Savoy in Lausanne, bringing together leading experts, policymakers, and investment professionals for a day of high-level dialogue on the future of pensions and institutional investing.

Key themes included the growing centrality of geopolitics in investment strategy, the accelerating role of AI in shaping economic productivity, the complexities of pension reform, and the emergence of a new era defined by structural uncertainty rather than calculable risk. Speakers emphasized the need for adaptive governance and more resilient portfolio construction frameworks.

We extend our sincere gratitude to all speakers, including General Sir Alexander Richard David Shirreff, KCB, CBE I Serge Ledermann, Founder, 1995 Advisors SA I Samy Chaar, PhD, Global Chief Economist and CIO for Switzerland, Lombard Odier I Claude Nicollier, First Swiss Astronaut I Prof. Jean-Pierre Danthine, Economist and Deputy Chairman of the Swiss National Bank from 2012 to 2015, and many more, whose insights elevated the conversation.

Special thanks to our Platinum Sponsors: HSBC Asset Management, Jupiter Asset Management, J.P. Morgan Asset Management, PGIM Fixed Income, and our Gold Sponsors: Edmond de Rothschild, PIMCO, Robeco, and Swiss Life Asset Managers.

A warm thank you also goes to the SPC RO Committee for their tireless work in making the event a success.

We look forward to building on the insights shared and continuing this vital conversation.



ESG Conference Zurich

On **20 May**, CFA Society Switzerland hosted the ESG Conference Zurich, bringing together over 150 investment professionals for a day of dynamic dialogue on sustainable investing.

The conference featured a distinguished lineup of speakers who shared insights on regulatory developments, ESG risk integration, climate policy, biodiversity, and active engagement strategies. A clear message resonated throughout the day: ESG is no longer a niche - it is fundamental to fiduciary duty and long-term value creation.

We extend our gratitude to our expert speakers, to our Platinum Sponsors - Candriam, QUAERO CAPITAL, Robeco, and Zürcher Kantonalbank - and our Gold Sponsor, Aberdeen, for their support.

A special thank you goes to our ESG Committee for their dedication and outstanding work in bringing this event to life.

Thank you to all attendees for contributing to an inspiring and thought-provoking event. Together, we continue to shape a more responsible and resilient future in finance.



Career Mentoring Program Kick-off Events

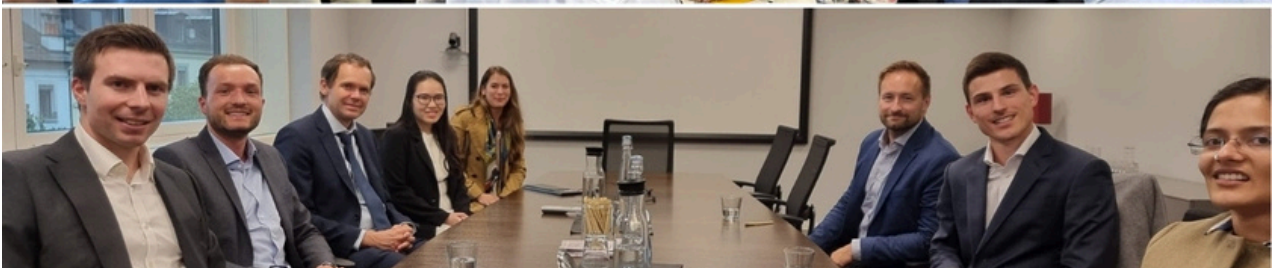
On **04 June**, we proudly launched our Career Mentoring Program 2025 with vibrant Kick-Off Events held in both Geneva and Zurich.

These gatherings brought together a diverse community of early- and mid-career professionals - driven to grow and learn - alongside seasoned finance leaders eager to give back by sharing their insights and guiding the next generation.

Our **Career Mentoring Program** goes beyond traditional career development by fostering meaningful connections that support goal-setting, knowledge-sharing, and long-term professional growth. The Kick-Off Events provided an engaging and welcoming space for participants to begin building these impactful relationships.

Special thanks to QUAERO CAPITAL for hosting us in their Geneva office, and to the University of Zurich for providing an inspiring venue in Zurich.

We look forward to supporting the continued growth of our mentoring pairs and celebrating their progress throughout the year!



Award Ceremony & Annual Dinner Zurich

On **25 June**, the CFA Society Switzerland community gathered in Zurich for a truly memorable evening of recognition, insight, and celebration - featuring two standout segments: the Award Ceremony and the Annual Dinner.

Award Ceremony - Honouring New Charterholders

The event began with an inspiring Award Ceremony dedicated to welcoming the newest CFA charterholders into the community. Against the historical backdrop of Zunfthaus zur Meisen, guests enjoyed a festive apéro as new members received their CFA charters from **Marg Franklin, CFA**, President and CEO, CFA Institute - a proud milestone marking years of dedication and academic achievement.

The atmosphere was filled with pride and camaraderie as peers, mentors, and leaders in the financial community came together to celebrate this achievement. A special thank you to our sponsor Nuveen, a TIAA company, for supporting this celebration of excellence.

For those who missed it, the next Award Ceremony will take place in **Geneva** on **20 November** at the Four Seasons Hotel.



Annual Dinner – A Night to Remember

As day turned to evening, the venue transitioned into a scene of elegance and exchange for our Annual Dinner – an unforgettable night of thought leadership, fine dining, and vibrant networking.

We were honored to welcome two extraordinary speakers:

Sergio Ermotti, Group CEO, UBS, shared his insights on navigating complexity in global finance. His reflections on leadership during times of change and the evolving responsibilities of financial institutions resonated deeply with a room full of engaged professionals.

Marg Franklin, CFA, President and CEO, CFA Institute, captivated the audience with her forward-looking vision for the investment profession, emphasizing integrity, inclusion, and the vital role of CFA charterholders in shaping the industry's future.

A heartfelt thanks to our speakers, members and guests for joining this special evening and to Nuveen, a TIAA company, our Strategic Sponsor, for supporting the event.



Q2 Webinars

All of our webinars are free of charge and open for everyone to join. Members can also download the recordings on our website.

15 April 2025, 12:15 - 13:15: The G in ESG: How Good are the Governance Ratings in ESG Ratings?

17 April 2025, 12:15 - 13:15: Women in Finance with Amaya Gutiérrez

07 May 2025, 12:15 - 13:15: American Exceptionalism

22 May 2025, 12:15 - 13:15: Women in Finance with Maryann Umoren Selfe

25 June 2025, 12:15 - 13:15: Regulated Activities on Public Blockchains

Networking Events

140 years – the Breitling Journey

On **15 April**, CFA Society Switzerland had the pleasure of joining **Breitling's 140th anniversary celebration** at their pop-up museum in Zurich, where members enjoyed an insightful presentation followed by an apéro riche.

Our heartfelt thanks to Dr. Lars Kaestle, CFO, Breitling, and Aleksandar Simoski, CFA, Global Head of Investor Relations, Breitling, for their engaging talk on the brand's remarkable journey - from its invention of the modern chronograph to becoming the first Swiss wrist chronograph in space. Since 2017, Breitling has undergone a successful transformation, now recognized as a leader in casual, inclusive, and sustainable luxury. With the upcoming integration of Universal Genève and Gallet in 2026, the brand's portfolio will further expand across air, land, and sea.

We are grateful to Breitling for their generous invitation and the opportunity to celebrate this milestone in Swiss watchmaking history.

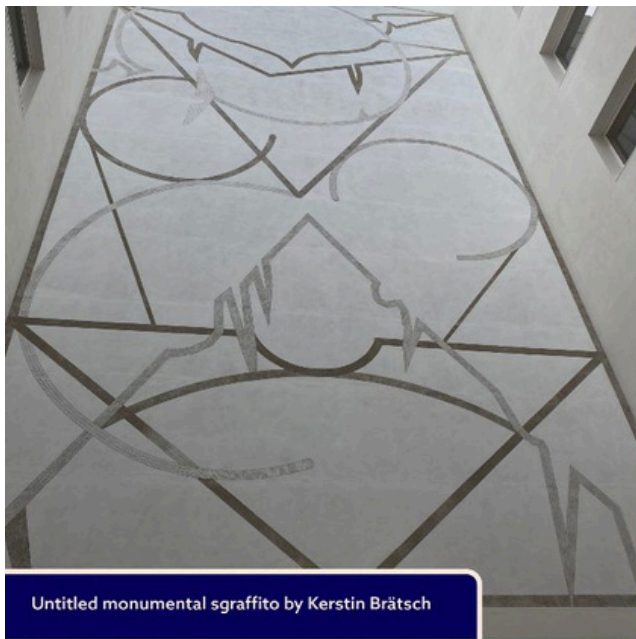


Guided Tour through the Contemporary Art Collection of Swiss Re

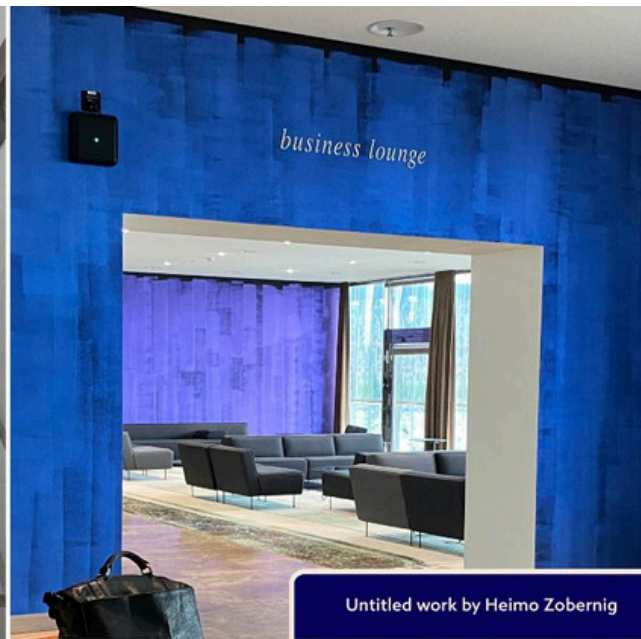
On **02 April**, CFA Society Switzerland hosted an exclusive **Guided Art Tour** at **Swiss Re Next** in **Zurich**, offering members a unique experience at the intersection of art and architecture.

Led by Rahel Robert, Head Art, Curating & Collection, Swiss Re, attendees explored key pieces from the prestigious Swiss Re Art Collection, including works by Kerstin Brätsch, Heimo Zobernig, Guyton\Walker, and a striking auditorium designed by Helmut Federle.

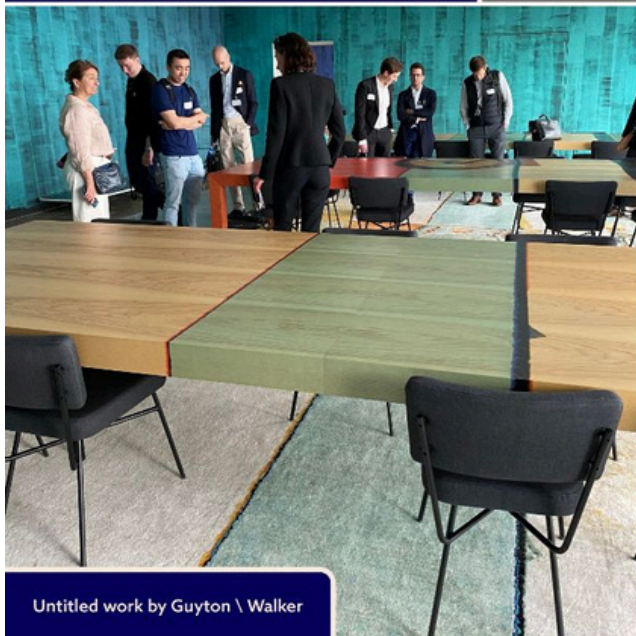
We extend our sincere thanks to Swiss Re for their warm hospitality and to Rahel for her expert guidance. Special appreciation goes to Diana Truong, CFA, of our Networking Committee, for initiating this inspiring collaboration.



Untitled monumental sgraffito by Kerstin Brätsch



Untitled work by Heimo Zobernig



Untitled work by Guyton \ Walker



"The Enormous Room" by Helmut Federle

Networking Drinks Across Switzerland: Building Connections

This quarter, CFA Society Switzerland brought its community together again through a vibrant series of after-work drinks held in Lugano, Basel, Bern, Geneva, Lausanne and Zurich. These gatherings offered a relaxed yet engaging atmosphere for members to connect, exchange ideas, and strengthen professional ties.

We look forward to resuming our regular after-work drinks after the summer break and welcoming you back. Stay tuned — upcoming dates will be announced on our website and in the weekly newsletter over the next few weeks.

Women in Finance

Women in Finance Networking Apero

On **22 May**, CFA Society Switzerland hosted its semi-annual Women in Finance Networking Apéro at Gabbani in Zurich—an evening dedicated to connection, collaboration, and empowerment.

Bringing together women from across the finance industry, the event provided a welcoming space for meaningful conversations, idea sharing, and the forging of new professional relationships. Attendees enjoyed an inspiring and supportive atmosphere, reflecting our ongoing commitment to fostering an inclusive and dynamic financial community.

Thank you to all who joined us and contributed to the evening's success. We look forward to continuing to grow this vibrant network together.



University Collaborations

Research Challenge

In **April** and **May**, the Université de Neuchâtel team achieved an extraordinary milestone by advancing to the Global Final of the CFA Institute Research Challenge 2025, proudly representing CFA Society Switzerland and the entire EMEA region.

Following a strong performance at the EMEA Regional Final on 10 April, the team—Jan Anusiewicz, Elisabeth Pauli, Hương Tăng, Khydr Arus, and Shanth Vidyababu—secured their place among the top 6 teams globally, out of more than 6,800 students from 1,153 universities across 120 countries. Their final presentation took place on May 5 in Chicago, where they delivered a world-class performance on their analysis of Burckhardt Compression.

We warmly congratulate the students and extend our gratitude to their faculty mentors Prof. Carolina Salva, Sofiya Pugachyova, and the wider coaching team including Florian Weigert, Prof. Dr. Eelco Fiole, CFA, Polina Efremenko, PhD, and industry mentor Raphael Jaggy, CFA.

Special thanks go to Zürcher Kantonalbank, 2Xideas, and Finanz und Wirtschaft for their generous support, and to the organizing team led by Mark Temnikov, CFA, Malek Benlarbi Delai, CFA, and Olivier P. Müller, CFA.

We are incredibly proud of the team's outstanding achievement and look forward to inspiring a new wave of talent in the 2026 edition of the Challenge!



The Ethics in Finance 2025 Award

On **28 May**, the Université de Neuchâtel awarded Zürcher Kantonalbank, Swisscanto, and the Verband Schweizerischer Kantonalbanken for their Swisscanto Portfolio Fund Sustainable Balance – Education Initiative. The fund donates 2% of net assets annually to Education Cannot Wait, supporting education in emergencies. With strong SDG, ESG, and exclusion policies, it showcases finance as a force for good. The initiative is backed by the Swiss FDFA.

The award was presented by Professor Florian Weigert, Director of the Master's in Finance at University of Neuchâtel, on behalf of the jury and its president, Prof. Dr. Eelco Fiole, CFA, and accepted by Dr. Anja Hochberg, Head of Multi-Asset Solutions, Zürcher Kantonalbank, and Christian Leugger, Head of Media and Public Relations, Union of Swiss Cantonal Banks.

CFA Society Switzerland supports these initiatives, proving ethical finance drives both returns and real-world impact.





Thank you!

to our sponsors for your support in making
these great events possible!

Renew your Membership!

Last quarter, we kicked off our Membership Renewal campaign — and we're excited to continue the journey with you into a new year full of opportunities, connections, and impact.

If you haven't renewed yet, now is the perfect time! Stay part of a thriving community that empowers your professional growth every step of the way.

Renew your membership today and make the most of the opportunities to come.

[Renew here!](#)

Stay Connected with Us on LinkedIn!

Join a growing community of over 12,000 finance professionals and enthusiasts who follow us for the latest industry updates, expert insights, and event highlights.

Follow us today and be part of a vibrant network advancing the future of the investment profession.

[**Follow us today!**](#)

SAVE THE DATES FOR 2025

In-Person

Career Paths

- 24.09.25 - Zurich

Lucky Punch at Lunchtime

- 25.09.25 - Zurich

Building Bridges

- 01.10.25 - Geneva

Research Challenge Kick-off

- 09.10.25 - Zurich

UBS Ambassador Program

- 23.10.25 - Zurich

Career Fair at HEC Lausanne

- 30.10.25 - Lausanne

Mid-year Mentoring Program

- 05.11.25 - Zurich

Bundeshaus visit

- 11.11.25 - Bern

Lugano Finance Forum

- 18.11.25 - Lugano

Webinar

Biodiversity

- 18.09.25 - Online

Conference - Save the Date

Generations Conference

- 22.09.25 - Zurich

Award Ceremony & Annual Dinner

Award Ceremony & Annual Dinner

- 20.11.25 - Geneva

Networking Drinks

- 09.09.25 - Zurich
- 10.09.25 - Geneva
- 24.09.25 - Lausanne
- 08.10.25 - Geneva
- 14.10.25 - Zurich
- 11.11.25 - Zurich
- 12.11.25 - Geneva
- 03.12.25 - Lausanne

Dates for Lugano, Bern, and Basel will be soon announced.



See all upcoming events

We are always open to new suggestions and your feedback. Do you have an idea for a topic or a speaker? Feel free to send your suggestions to info@cfasocietyswitzerland.org