

FIONA FRICK

Recognised by the Financial Industry on numerous occasions as one of the most Influential Women in European Finance.

Investment Specialist with three decades hands-on experience in the Asset Management Industry as a practitioner, board member and CEO.

High Profile in both the Finance Industry as well as Academia with a strong public role and respected speaker on Economics, Financial Markets, and the rise of Sustainable Finance.



PROFESSIONAL EXPERIENCE



CIRCE
INVEST

MANAGING PARTNER 2023

- Provide strategic guidance on investment positioning.
- Integrate sustainability consideration into asset allocation and investment processes.
- Enhance asset allocation diversification and active risk management.
- Advise on alternative investments.



CEO 2011 to 2022

- Implemented diversification of Unigestion to be less dependent on equity revenues.
- Developed a Private Equity franchise through internal and external growth with the acquisition of Akina, a Private Equity specialist.
- Instigated Unigestion overall approach to sustainability with ESG integration embedded across each investment unit and company ethos.
- Led transformation of technological platform to enhance efficiency and scalability of process as well as integrating multiple data sources.
- As a thought leader, great ambassador to the firm, contributing to international brand recognition.

HEAD OF EQUITY 1995 to 2011

- Led development of company's equity activities adopting a pioneer approach for managing equities based on academic research published by Haugen and Baker in 1991 based on the Minimum Variance anomaly.
- Developed Unigestion equity activity from scratch by building a business vertical with own P&L and participating actively in raising revenues for this new activity.

NATIONALITY

SWISS

HIGHER EDUCATION

CFA CERTIFICATE IN ESG INVESTING

2023

IESE BUSINESS SCHOOL & HARVARD BUSINESS SCHOOL

Value Creation through Effective Boards
2023

IMD BUSINESS SCHOOL

Advanced High Performance Leadership Programme (AHPL)
2013

IMD BUSINESS SCHOOL

High Performance Leadership Programme (HPL)
2009

UNIVERSITY OF DIJON

Degree in Literature & Philosophy
1998 - 2001

INSTITUT SUPERIEUR DE GESTION

Master of Business Administration
MBA
1988-1991

INVESTMENT MANAGER IN HIGH YIELD & CONVERTIBLE BONDS 1993 to 1995

- Responsible for management of products invested in international high yield and convertible bonds.
- Developed a pricing model for convertible bond management using option pricing and bond valuation.

FINANCIAL ANALYST 1990 to 1993

- Started a career at Unigestion as financial analyst issuing investment opinions on companies' candidates for our high yield funds.

POSITIONS ON BOARDS & ASSOCIATIONS

- Board Member of Swiss Sustainable Finance, June 2020 - Present
- Board Member of Sustainable Finance Geneva, June 2017 - Present

PUBLICATIONS

Investment Week - Oct 20, 2022:

How to invest in a world of low growth, high inflation, and high rates?

https://circeinvest.com/themes/circe/assets/doc/Fiona_Frick_IW_201022.pdf

Investment Week - January 24, 2022:

Social alpha: The next step in evolving fiduciary duty

https://circeinvest.com/themes/circe/assets/doc/Fiona_Frick_IW_240122.pdf

Swiss Finance Institute Roundups - Nov 2, 2021:

Corporate Governance at the Crossroads

<https://www.sfi.ch/resources/public/dtc/media/roundup-en-corp-gov.pdf>

Investment Week - June 24, 2021:

ESG: Toward a more purposeful capitalism and fiduciary duty

https://circeinvest.com/themes/circe/assets/doc/Fiona_Frick_IW_240521.pdf

Financial Times · Jul 30, 2020:

We all need to reassess what we understand by the word "risk"

<https://circeinvest.com/themes/circe/assets/doc/MNLO18v2final.pdf>

AIMA · April 16, 2018:

Perspective: Industry leaders on the future of the hedge fund industry

<https://www.aima.org/educate/aima-research/perspectives-research.html>

SHARING KNOWLEDGE

Regular Speaker at Conferences, such as:

- I.U.C.N. International Union for Conservation of Nature
- FT Asset Management Summit
- Milken Institute Global Conference
- Robin Hood Investors Conference
- CFA Institute
- 100 Women in Finance
- FT Climate Live
- Investment Week Sustainable Festival

Lectures at universities

- IMD Business School
- Graduate Institute
- University of St Gallen
- Swiss Finance Institute
- Imperial College London
- Oxford University

LANGUAGES

ENGLISH | Fluent

FRENCH | Fluent

ITALIAN | Fluent

SPANISH | Intermediate

GERMAN | Intermediate