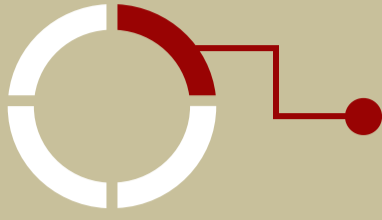




1-YEAR ANNIVERSARY REVIEW



GOALS



PARTNER

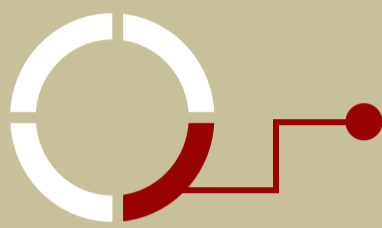
April 1st, 2023; Creation of Circe Invest
Fiona Frick assists asset owners and asset managers in allocating capital through an integrated vision of risk, return and sustainability



Clients



Projects



GIVE BACK

Fiona Frick continues to share her knowledge through:



Education



Conferences



Research



Press



PARTNERING

CLIENTS

2

Partnerships



Leading Provider of Impact platforms and datasets

- Current project involves a joint investment research paper aimed at integrating sustainability into a quantitative portfolio optimisation process.
- Developing a framework for portfolio construction that incorporates impact data with risk and return estimates.



Leading Multi-Stage Private Equity and Venture Capital Group, overseeing \$1.7 billion in Assets Under Management

- Advising the board of ACE & Company on strategies to enhance product positioning, investment processes, and governance.



TEAM UP

PROJECTS

3

Collaborations

- Coordinate a round-table with institutional investors in micro-credit to clarify positioning and expectations of this asset class within client allocation.
- Engage in a project to advocate investor awareness in risks and impacts associated with investing in fragile and conflict-prone areas.
- Initiate discussions with asset owners to incorporate climate change mitigation strategies into their real estate investments.



SHARE

EDUCATION

10

Interventions at Conferences

Circe Invest foundational commitment includes sharing knowledge in investment and sustainability.

- Intervened in 10 conferences in 2023, including IUCN annual symposium, Investment Week and Fund Forum. 9 out of 10 conferences focused on the evolution of sustainability in investment.
- Participated in 2 podcasts; CAIA Educational Alpha and CFA Society Switzerland.
- Lectured at prestigious universities such as the Graduate Institute, HEC Lausanne, and University of Geneva.
- Sponsored a research project with a student at the London School of Economics on Balancing Environmental Transition with Social Consideration.



CONTRIBUTE

NON-PROFIT

2

Board Seats in Non-Profit Associations

Continued board duties with Swiss Sustainable Finance (SSF) and Sustainable Finance Geneva (SFG).

With SSF, fostering dialogue to support the Swiss Financial Centre in achieving a leading position in sustainable finance.

With SFG, influence French speaking Swiss Financial Industry in setting an agenda for finance to be at the service of society.



IMPACT

COMMUNICATION

4800 & 20

Followers & Posts

- Launching Circe Invest Website: 3135 Visitors in 1 week
- 20 Posts published on LinkedIn in the first year and 4800 followers
- Dedicated monthly column with 4 insightful articles in Investment Week

