

# NOTZ STUCKI

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INVESTMENT CONFERENCE 14 JANUARY 2020

09:00 BREAKFAST

09:30 CONFERENCE

**Louis-Vincent Gave**, Chief Executive Officer, **Gavekal**

*Is the US out-performance coming to an end?*

**Stefan Blum**, Senior Portfolio Manager, **Bellevue Asset Management**

*Making the healthcare system more efficient with Digital Health*

**Munib Islam**, Co-Chief Investment Officer and Partner, **Third Point LLC**

*Activism as an Investment Strategy*

11:00 Q&A

11:30 END OF THE MEETING & COCKTAIL LUNCH

**LOCATION**

Rue de Saint-Jean 98,  
1201 Geneva (Parking available)  
Auditorium: Level -1

**ATTENDANCE CONFIRMATION**

conference@notzstucki.com ; +41 22 906 52 50

## LOUIS-VINCENT GAVE

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### GAVEKAL



After receiving his bachelor's degree from Duke University and studying Mandarin at Nanjing University, Louis-Vincent joined the French Army where he served as a second lieutenant in a mountain infantry battalion. After a couple of years, Louis-Vincent left the army and joined Paribas Capital Markets where he worked as a financial analyst first in Paris, then in Hong Kong. Louis-Vincent left Paribas in 1999 to launch GaveKal Research with Charles and Anatole. Louis-Vincent is CEO of Gavekal and MW GaveKal and frequently contributes to the research. He is married with two sons and two daughters.

## STEFAN BLUM

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### BELLEVUE ASSET MANAGEMENT



Stefan Blum joined Bellevue Asset Management in 2008 and is lead portfolio manager of the BB Adamant Medtech & Services (Lux) Fund. He has 15 years of experience in the healthcare sector. Prior to joining Bellevue Asset Management, he spent four years as head of investor relations at Sonova, the world's largest manufacturer of hearing instruments. As a financial analyst at Bank Sarasin from 1996 to 2000, he covered medical technology and high tech stocks. After that he served as CFO of Obtree Technologies Inc. and advised listed Swiss companies on strategic investor relations issues. Stefan Blum obtained a degree in business administration from the University of St. Gallen and is a graduate of AZEK.

## MUNIB ISLAM

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### THIRD POINT LLC



Munib Islam is Co-Chief Investment Officer and a Partner at Third Point LLC. As Co-CIO, Munib spearheads research on Third Point's equity investments globally, including in recent activist names like Baxter – where he spent four years on the Board of Directors, Sony, Campbell's, Nestlé, and DowDuPont. Munib is integrally involved in firm operations including investing, risk management, marketing, hiring, and talent development.

Munib worked at Third Point from 2004-2008 and rejoined the firm in 2011 after returning from Highbridge Capital, where he was a Managing Director and Portfolio Manager of Highbridge's European Value Equities fund. Before coming to Third Point, Munib worked as an Associate at Oak Hill Capital and at Lazard LLC. He received a B.A. in Economics magna cum laude from Dartmouth College and an MBA from the Graduate School of Business at Stanford University. He currently sits on the Boards of the Stanford Business School Trust and the Brearley School in New York City.

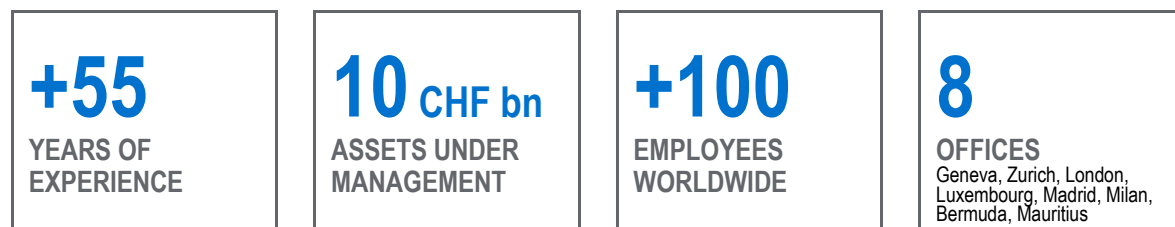
## ABOUT NOTZ STUCKI

Founded in 1964, we are now one of the largest fully independent asset management groups in Switzerland and in Europe. For 55 years, we have developed a unique expertise in selecting the best fund managers worldwide and combining them to build robust and top-performing portfolios.

International and sophisticated, our clients are High Net Worth individuals, Family Offices, sovereign wealth funds, pension funds, wealth management companies or corporations, who have in common the same requirement for superior absolute returns and bespoke service.

100% owned by our management, we are fiercely independent and free from any external pressure that would hinder our impartiality. We invest alongside our clients, thus ensuring that our interests are fully aligned.

Notz Stucki is regulated by the Swiss Financial Market Supervisory Authority FINMA as an authorized asset manager of collective investments.



## HISTORY

In 1964, Beat Notz and Christian Stucki, two truly independent and visionary minds, imagined a new wealth management concept. Indeed, they were among the first to understand the huge potential offered by a few incredibly talented money managers in Wall Street and decided to tap their legendary trading skills to complement their in-house expertise.

So they developed a methodology to select and monitor them, and basically invented hedge fund selection and multi-manager investing.

## BUSINESS LINES

We offer the same specialist expertise and dedication to our clients across our three business lines:

### WEALTH MANAGEMENT

- > Discretionary
- > Advisory

### ASSET MANAGEMENT

- > Notz Stucki Funds
- > Investment solutions

### MANCO SERVICES

- > Fund engineering
- > Dedicated fund services

## INVESTMENT PHILOSOPHY

Our investment philosophy is based on a few clear-cut principles:

- We take the long term view in order to capture major trends.
- Our objective is absolute performance and place capital preservation as our top priority.
- We generate alpha through active management led by strong convictions.
- We rely on disciplined processes to achieve consistency.