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"We are thematic and quantitative thinkers that turn disparate data and research into clear strategy recommendations."



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# BLENDING QUALITY AND QUANTITATIVE APPROACHES PROVES WORTH FOR CDR CAPITAL

Jenny Hennessy, Chief Operating Officer, **CdR Capital SA**, discusses the qualities of her business and reasons for success.



**Jenny Hennessy**  
Chief Operating Officer, CdR Capital SA

## What sets you apart from your peers this year and why?

We have used the COVID era as a period of reflection to look inwardly at how we might continue our growth strategy and achieve our business objectives, and as a result, have upgraded substantially our investment processes and our investment team. We believe that our mix of quantitative and qualitative investment techniques are cutting edge, and this is starting to show in our investment performance.

## How have your colleagues contributed towards the success of your organisation?

We have always hoped that CdR would be greater than the sum of its parts. We are just as proud of our office managers, head of trading, investment team, operational professionals as we are of our senior bankers.

## What are going to do to stay on the front foot in a fast-growing but also challenging region such as this?

The impact of regulatory change and consolidation in the Swiss financial services industry is now upon us. This is an exciting time to be in business and we believe that the key to success will be continuing to attract senior bankers, our

investment performance and aggressive use of new technologies to better serve our clients, without deviating from a business model which works.

## What have been the challenges you have had to overcome to reach such a standard?

Identifying appropriate technology, continuously working on internal communication and team work and keeping up to date with the rapidly changing regulatory environment.

## How has your business and business model reacted to the pandemic? Have you introduced new working practices that will endure?

COVID has taught us that video-conferencing can help us highlight the best of CdR's people and our strength in depth. Nevertheless, in any trust-based business, face-to-face meetings are crucial and like all of our competitors, we've found the inability to travel to meet clients frustrating during this time.

As for working practices, working from home, whilst sub-optimal for collective morale and ideas exchange, is a positive for productivity.

## What lessons have been learnt that can be carried forward?

There is no need to deviate from a business model that works, even in a crisis.

## Have your differentiators become more important to your business? Are they still relevant?

We believe that the diversity of background, gender and skillset together with our investment expertise are the key strengths of our business, whose importance will endure.

## Has morale amongst your colleagues held up well during the pandemic? What have you done to bolster their spirits?

The frustration of not being able to meet clients has been strongly felt at CdR

across the board. We have bolstered morale with London-style pub quizzes for the staff and (in recognition that productivity remained high despite our staff having to convert their homes into their place of work) have focused on communication with and gifts to the families of our colleagues and partners.

## What are the prospects for wealth management in the future bearing in mind a new social and economic environment ahead?

We believe that there is a powerful trend in the favouring of independent wealth management. The biggest challenge that we see is the inter-generational succession in both the client base and indeed our industry. The next generation will have very different investment goals (including ESG) and very different needs in terms of connectivity.

## Whom do you look to for inspiration and ideas?

We have good relations with many of our peers and competitors. We admire anyone on the same entrepreneurial journey as ourselves.

## What do you hope will be the result of receiving this accolade? How does it help your business in this region?

The respect of our peers is important to us. As the industry consolidates, prestigious awards like this have an even greater value. We do however acknowledge that our clients will continue to judge us by the quality of our level of service and their investment returns. ■







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WINNER: Schoeb Frote, Finanzlab and Capitalium Advisors



WINNER: CDR CAPITAL