

Investing with a long-term tailwind: The Benefits of Thematic Private Equity

Thematic Investing has seen an impressive growth over the last decade in particular in long-only investing. The main advantage of thematic investment is the possibility to exploit long-term growth trends. These trends can emerge from technological shifts, demographic developments or changes in social behavior. Where such trends intersect, they create strong secular investment themes which in the long-term outperform global equity markets. We are convinced that the concept of thematic investment can be applied also to Private Equity. Even more, we think with the natural long-term focus of private equity makes the asset class particularly well suited for thematic investing. Pierre Stadler will show you how we identify thematic opportunities in current private markets and how we construct portfolios. He will also discuss with you in which sectors we seek exposure and present the respective investment cases.

Pierre Stadler



Pierre joined Pictet in 2007. He is one of the four members of the Investment Committee and leads the Thematic Private Equity investment team at Pictet Alternative Advisors. In 2014, Pierre joined the Carlyle Group for a secondment, working within the Carlyle Global Financial Services Partners investment team in New York. Pierre is a member of several Advisory Boards within Pictet Alternative Advisors' portfolio. He brings a 15 year long experience in Private Equity fund investing and sourcing & executing on numerous direct/co-investment transactions.

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