



ETF and Index funds – how to find the most efficient vehicle for my needs?

Indexed investments have become hugely popular not only amongst institutional investors, but increasingly with private wealth money being invested in a more institutional way. Against this background, the universe of available products is growing daily with ETFs taking the centre stage. At the same time, Index Mutual Funds – formerly a pure institutional tool, which has been around for decades – is the new kid on the block when it comes to passive investing. Whilst both ETFs and Index Mutual Funds share a similar investment case, few investors have a clear view yet on the subtle differences between these products and a lack of concept on how to deploy these vehicles alongside.

The session will address the following topics:

- What are the key differences between ETFs and Index Mutual funds?
- What exposure makes most sense for which investor and purpose?
- Case Study: Why Index Mutual Funds are not in general “the better and cheaper” ETF

Marco Strohmeier

Marco Strohmeier is heading the iShares and Indexing team for the German-speaking part of Switzerland. He has ten years' experience in capital markets with prior roles at J.P. Morgan as cross-asset derivatives and structured product sales and with the Coutts investment office. Marco Strohmeier holds a Master's degree from the University of St. Gallen in banking and finance.

iShares and Index Investing, BlackRock

Marco Strohmeier
+41 44 297 73 88
marco.strohmeier@blackrock.com
www.ishares.ch