

Curriculum Vitae

Name: Dr. Peter Josef Mathis
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Date of birth: Oct. 16, 1959
Nationality: German and Luxembourgish
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Work Experience

- 11/2020 – present** **University of Luxembourg, Luxembourg**
 Department of Finance
 Research Scientist Sustainable Finance
- 01/2016 – 10/2020** **BCB Partners S.A., Luxembourg**
 Managing Partner and Chief Investment Officer
- 05/2014 – present** **M Capital Advisors S.A., Luxembourg**
 Owner and Chief Executive Officer and Owner
 Consulting company specialising in asset management
- 08/2010 – 04/2014** **IKANO S.A., Luxembourg**
 Head of Group Asset Management
 Responsible for all Capital Market Investments
 Face-to-face advice of beneficial owners in economic and financial market questions
- 12/2007 – 07/2010** **ING Group, Den Haag (Netherlands)**
- 09/2009-07/2010 Head of Fixed Income Global and Private Banking Discretionary Portfolios,
 ING Investment Management, Den Haag/Luxembourg
 Responsible for Fixed Income All Grade of ING Investment Management and Multi
 Asset Class Portfolios (Equities, Fixed Income, Commodities, Real Estate, Hedge
 Funds) for ING Private Banking Clients
- 12/2007-08/2009 Head of Portfolio Management, ING Private Capital Management, Luxembourg
 Responsible for Multi Asset Class Portfolios (Equities, Fixed Income, Commodities,
 Real Estate, Hedge Funds)
 Advising and consulting clients (HNWI and Family Offices) face-to-face
- 08/2006 – 10/2007** **CQS (Hedge Fund), London (United Kingdom)**
 Chief Investment Officer Equities / Senior Portfolio Manager
 Head Portfolio Manager of Global Equity L/S portfolios

- 09/2005 – 07/2006 Dr. Mathis Financial Management Consulting, Frankfurt (Germany)**
 Realisation of a Venture Capital Fund of Fund for a Private Equity Company
 Project with a Swiss software company on „Agent Based Technologies“ in Financial Services
 Project on „Mark-to-market of Venture Capital“
 Project on „Replication Strategies in Fund-of-Fund Management“
- 09/1997 – 08/2005 DekaBank, Frankfurt (Germany)**
- 01/2003-08/2005 Deputy Member of the Management Board of DekaBank Frankfurt and Deputy Chairman of the Board of DekaBank S.A. Luxembourg
 Responsibility for all Asset Management Activities of DekaBank (Asset Management, Capital Markets, Fund Services, Sales Institutional Clients, Economic Research)
- 01/2002-12/2002 Deputy Chairman of the Management Board of Deka Investment GmbH, Frankfurt
 Responsible for the reorganisation of Deka Investment
 Direct contact on board level for 15 international institutional clients
- 12/1999 – 12/2001 Director of DGZ DekaBank, Frankfurt
 Head of the department „Financial Engineering & Consulting“
- 09/1997 –12/1999 Vice President of Deka Investment Management GmbH, Frankfurt
 Head of „Quantitative Portfolio Management/Product Development“
- 07/1995 - 08/1997 Credit Suisse Asset Management, Frankfurt (Germany)**
 Head of Quantitative Portfolio Management / Product Development
- 07/1994 - 06/1995 Metzler Investment GmbH, Frankfurt (Germany)**
 Head of Quantitative Portfolio Management
- 01/1993 - 06/1994 Unternehmensberatung Dr. W. Lengling, Niedernhausen (Germany)**
 Consultant/Project Manager for strategic consulting projects for public companies
- 10/1987 - 08/1991 & 05/1992 - 01/1993 Research Assistant, Institute for Theoretical Economics, Universität des Saarlandes, Saarbrücken (Germany)**
Prof. Dr. Dr.h.c. R. Richter
 Research and Teaching
 Focus Areas: Corporate Finance, Financial Economics & Capital Market Theory, Macroeconomics, Game Theory

Education

- 1992 PhD in Economics at Universität des Saarlandes, Saarbrücken (Germany)**
 Academic degree: Dr. rer. pol. (magna cum laude)
 Focus: Capital Market Theory/Financial Economics
- 09/1991 - 05/1992 Horstmann Fellowship, Department of Economics, Indiana University, Bloomington (Indiana), USA**
 Post Graduate Studies (Corporate Finance, Econometrics/Statistics, Macroeconomics)
 Academic degree: Master of Arts in Economics

- 10/1981 - 10/1987** **Studies of Business and Economics at Universität des Saarlandes, Saarbrücken (Germany)**
Academic degree: Diplom-Kaufmann (Controlling/Audit, Taxation)
- 1979 - 1981** **German Navy, Military Service (compulsory)**
1970 - 1979 **Otto-Hahn-Gymnasium Saarbrücken, Abitur (exam qualifying for University attendance)**

Lectures & Presentations

- Modern Portfolio Management, SS 2004, SS 2005, SS 2006, Hochschule für Wirtschaft und Umwelt, Nürtingen
- Strategic Investment, WS 2005, Hochschule für Wirtschaft und Umwelt, Nürtingen
CFA, Teaching Candidates CFA Level 1 and 2, 2010-2015, Luxemburg
- Unpredictable Markets and the Burden of Asset Allocation, Bloomberg Family Office Symposium (2015)
- Lessons learned? The need for a fresh approach of liquid wealth management, Bloomberg Family Office Symposium (2014)
- Strategische Herausforderungen und Chancen für Asset Manager, 7. Jahrestagung Portfolio Management, Frankfurt/Main (2004)
- Incentive Problems in Equity Markets and Investor Confidence, GFSI-Summit, DeloitteTouche, Venice (2003)
- Prognosemodelle für die Asset Allocation: Einsatz in der Praxis, Seminar „Asset Allocation“ des Uhlenbruch-Verlages, Königstein/Taunus (2001, 2002, 2003, 2004, 2005)
- Portfolio Management, 12. Lehrgang Grundlagen des Treasury Management, Schwabe, Ley & Greiner, Glashütten/Taunus und Frankfurt/Main (2002,2003)
- Contrarian Investing: Eine erfolgreiche Anlagestrategie, 3. Jahrestagung Portfolio Management, Frankfurt/Main (2000)
- Stock Picking mit dem Dividend Discount Model, Konferenz Portfolio Management, IIR, Frankfurt/Main (1994)

Languages

English:	fluent
German:	mother tongue
French:	fluent

Luxemburg, 26.02.2021

Dr. Peter J. Mathis