

Dennis Ellegren, CFA, CMT

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Experience

Alpen Partners

Freienbach, Switzerland

Portfolio Manager

2024 - Present

- Manage CHF 600m of CHF 4bn AUM in multi-asset client portfolios, managing a wide range of investment strategies depending on client risk profile and appetite
- Build investment cases from first principles using detailed financial modelling, peer benchmarking against industry leaders, and multi-year operational and capital allocation analysis
- Run the full investment process for the portfolio from idea generation and diligence through execution, monitoring and client communication
- Continuously monitor and reassess allocations, portfolio holdings and potential replacements in the context of the changing macroeconomic and political environment
- Communicate strategy, performance and macro positioning directly to key clients, consisting primarily of HNW principals
- Risk management of factor exposures, concentration risks and changing client circumstances

UBS

Zurich, Switzerland

Equity Trader

2023 - 2024

- Managed large listed-equity positions across European, Swiss and selected GCC names, with full ownership of sizing, liquidity, hedging and execution
- Designed and executed the desk's hedging programme using equity options, CDS and FX, including direct work with brokers and counterparties
- Operated through several major market dislocations including Covid-19, the Russia-Ukraine escalation, and the 2022–2023 rate cycle, sharpening judgement on how positions behave under stress
- Built the team's Python, Bloomberg API, SQL and VBA analytics infrastructure from scratch, covering universe screening, position monitoring, risk reporting and document workflow
- Developed an understanding of execution as a real cost and of liquidity as a position-level constraint, not an afterthought

Credit Suisse

Zurich, Switzerland

Equity Analyst

2019-2023

- Covered primarily European and Swiss listed companies with full-cycle fundamental research, including detailed operating models, DCF valuations, peer benchmarking and capital structure analysis
- Analysed credit profile and bond instruments alongside the equity to form a complete view of capital structure and downside risk
- Produced earnings reviews, financial statement analysis, news commentary and macro impact assessments to support both internal users and clients
- Followed companies over multi-year horizons, building a working knowledge of management quality, strategic execution and capital allocation track record
- Designed and delivered the bank's global Excel and VBA training programme, teaching hundreds of colleagues across regions and seniority levels

Certifications	Chartered Market Technician®					2026
	CMT Association					
	CFA® Charterholder					2022
	CFA Institute					
Education	Lund University					Master of Science (MSc) • GPA: 3.83
	Finance					Sweden • 2018 - 2019
	<i>Top 40 world rank, by Financial Times.</i>					
	Lund University					Bachelor of Science (BSc)
	Economics					Sweden • 2015 - 2018
	Hong Kong University of Science and Technology (HKUST)					Exchange
	Finance					Hong Kong • 2017
Awards	Scholarship					2017
	Helsingborgs Chamber of Commerce					
	For academic achievements					
Skills	Bloomberg	Python	VBA	SQL		
	Expert	Expert	Expert	Advanced		
Languages	Swedish	English	French	German	Italian	
	Native	Native	Fluent	Advanced	Intermediate	
Interests	Programming			Nutrition		