

# Press release

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## **Dolfin hires Credit Suisse and UBS veteran for new Head of Investment Management role**

Dolfin, the independent and agile wealth management platform, has appointed Richard Gray as Head of Investment Management, a newly created role within the firm.

In his new position, Richard will lead Dolfin's investment team and further strengthen its asset management capabilities to best meet the needs of its private and institutional clients. His lengthy experience and depth of expertise in the generation of investment ideas and the construction of investment portfolios, will enable him to add further sophistication to Dolfin's investment management approach, delivering in-depth qualitative and quantitative investment methodologies.

Richard joins Dolfin from ACPI, where he was Co-Head of Institutional Wealth Management. Before ACPI, Richard was at Credit Suisse where he was the head of the Special Situations team and co-head of the Multi-Asset Group. Prior to that, Richard was an investment analyst at Credit Suisse and UBS. He managed the utilities research franchise at Credit Suisse and was co-head of UBS's top-ranked utilities equity research team. Previously, he was co-head of UBS's software & services equity research team.

Earlier in his career, with Threadneedle Investment Managers, Richard was the portfolio manager of a £500m+ equity fund which was actively invested in UK small- and mid-cap growth companies.

Richard commented: "I'm excited to be joining Dolfin where I see a rare opportunity to harness the firm's qualitative analysis together with its quantitative technology to create a truly modern investment process. This distinctive blend of human expertise and digital agility means we can offer component-based, flexible investment products that are very closely aligned with clients' goals."

Denis Nagy, CEO of Dolfin, said: "Having built a world-class custody platform and independent trading desk, we are now bolstering our investment capabilities. Richard's breadth of experience across the gamut of market conditions, his pragmatic focus on offering compelling investment products, and his track record of leadership, make him highly valuable to our clients and I'm delighted to welcome him to the team."



## About Dolfin

Dolfin is an independent and agile wealth management platform. We provide world-class custody, execution and asset management to private clients, financial advisers and institutional investors.

We pride ourselves on our ability to help, to be a one-stop-shop. This has earned us the status of true partner to our clients, who repeatedly come to us first with their new projects and ideas.

We open investment accounts promptly and safeguard assets; share our infrastructure; provide access to capital markets worldwide; and offer sophisticated investment expertise.

Our platform enables the likes of wealth managers, external asset managers, multi-family offices, small private banks and emerging fund managers to grow their business with simplicity and speed.

Founded as a London-based wealth boutique in 2013, today we offer diversified financial solutions, an international presence, and our own bespoke technology. Although we now look after more than \$1.6bn of client assets and handle around \$650m of brokerage flow every month, the commitment that drove us in those early days endures: we think differently and act faster than most.

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## More information

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