



# ACCLAIM

RECOGNISING LEADERS ACROSS THE GLOBAL WEALTH MANAGEMENT INDUSTRY  
**THROUGH THE *WealthBriefing* AWARDS PROGRAMME**

The Thirteenth  
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# Erlen Capital Management AG: Building on Independence Through Innovation and Responsibility



**Bruno Schneller**  
Managing Partner  
**Erlen Capital**  
**Management AG**

Since 1995, Erlen Capital Management AG has combined independence with a long-term, client-focused approach to wealth management. Based in Zurich, the firm specialises in discretionary portfolio management and advisory services for private clients, families and institutions. Its philosophy is rooted in transparency, disciplined investment processes and a clear alignment of interests with clients.

**What has been the most impactful innovation your firm introduced recently, and how has it shaped client outcomes or internal efficiency?**

Over the past year, our most impactful innovation has been the further refinement of our investment and decision-making framework. Rather than pursuing technology for its own sake, we focused on improving portfolio construction, risk monitoring and internal collaboration.

Enhanced analytical tools and clearer governance structures have allowed us to respond more decisively in volatile markets while maintaining consistency in execution. For clients, this has translated into greater transparency, faster decision-making and portfolios that remain aligned with long-term objectives even during periods of uncertainty.

**What are the key challenges you foresee in wealth management over the next five years, and how are you positioning your business to meet them?**

The wealth management industry is entering a phase of profound change. Increasing regulation, growing complexity of financial markets and rising client expectations for transparency and personalisation will challenge traditional models. At the same time, technological advances – particularly data-driven analysis and artificial intelligence – will reshape how investment decisions are prepared and communicated.

We are positioning Erlen Capital to meet these challenges by remaining deliberately

independent, investing selectively in technology, and strengthening the human element of advice. Our focus remains on thoughtful portfolio management supported by experience, judgement and accountability.

**What role has collaboration – either internally or with external partners – played in your success?**

Collaboration is a central pillar of our culture. Internally, close team cooperation ensures that different perspectives are considered before decisions are made. This collective approach reduces key-person risk and strengthens consistency across portfolios.

Externally, we work with a carefully selected network of partners and service providers who share our standards of quality and independence. These relationships allow us to access best-in-class research and infrastructure while retaining full control over investment decisions.

**What does winning this award mean to your firm, and how will you use this recognition going forward?**

Winning this award again is a strong endorsement of our approach and, above all, of our team. We see it not as a destination, but as a responsibility. The recognition reinforces our commitment to disciplined investing, continuous improvement and putting clients' interests first.

Going forward, we will use this visibility to further strengthen trust with existing clients, attract like-minded professionals and continue refining our offering. Our ambition is not rapid growth, but sustainable excellence.

In an environment that rewards short-term trends, Erlen Capital Management AG remains committed to long-term thinking – combining independence, innovation and responsibility to serve clients across generations.



# ERLEN

Independent Swiss Asset Manager since 1995

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