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Bellevue Asset Management announces succession plan for the Bellevue Medtech & Services and Bellevue Digital Health strategies

Bellevue today announced a long-term succession plan for its Medtech & Services and Digital Health strategies. As part of this carefully planned transition, Catharina Claes will assume expanded responsibilities as Portfolio Manager for both strategies from January 2027. Marcel Fritsch will continue in his role as Lead Portfolio Manager, while Stefan Blum will step down from his operational responsibilities at the end of 2026 and continue to support the team as an Advisor.

Catharina Claes has been a Senior Analyst within Bellevue's Healthcare Funds & Mandates Team for more than three years and has played an integral role in the investment process for both strategies. She has built deep expertise across Medtech, Healthcare Services and Digital Health. Prior to joining Bellevue, she spent several years as an Equity Analyst in London. In her new role, she will leverage her experience and sector expertise to support the continued success of both strategies.

The long-term succession plan ensures continuity in portfolio management. Marcel Fritsch will continue to lead both strategies as Lead Portfolio Manager, while the investment process, investment philosophy and client coverage remain unchanged.

Stefan Blum will step down from his operational responsibilities at the end of 2026. Together with Marcel Fritsch, he has helped shape the Medtech & Services and Digital Health strategies over many years and has guided their development through different market environments. He will remain associated with Bellevue as an Advisor, allowing the team to continue benefiting from his experience and deep industry expertise.

In addition, Bellevue plans to further strengthen its Healthcare Funds & Mandates Team through the recruitment of an experienced investment professional with proven expertise in Medtech.

Marcel Fritsch, Head Healthcare Funds & Mandates and Lead Portfolio Manager at Bellevue Asset Management, commented: «Catharina Claes is a highly regarded healthcare specialist who has been an integral part of our investment process for many years. She is exceptionally well positioned to assume expanded portfolio management responsibilities. Together, we will continue to build on our proven investment process while capturing new opportunities for our clients. I am also delighted that we will continue to benefit from Stefan Blum's experience and advice in his new advisory role.»

Stefan Blum commented: «It has been a privilege to help shape these strategies together with Marcel Fritsch and the entire team over many years. Catharina Claes is an outstanding colleague who is ideally positioned to assume additional responsibilities. I look forward to remaining associated with Bellevue as an Advisor and continuing to support the team.»

Catharina Claes added: «Innovation, demographic trends and the growing need for more efficient healthcare continue to create compelling long-term investment opportunities. I look forward to working alongside Marcel Fritsch and the entire Healthcare Funds & Mandates Team to capture these opportunities for the benefit of our clients.»

Contact

Bellevue Asset Management AG, Theaterstrasse 12, CH-8001 Zürich,
Fabienne Tresch, Tel. +41 44 267 67 00, ft@bellevue.ch, www.bellevue.ch

Bellevue – Excellence in Specialty Investments

Bellevue is a specialized asset manager with a focus on healthcare investments, small and mid-cap strategies, and other growth strategies where an active management style is particularly promising. Its product offering comprises investment funds, active ETFs, investment companies and institutional mandates. Founded in 1993 and listed on the SIX Swiss Exchange, Bellevue employs around 75 professionals and creates value added for clients and shareholders through attractive investment performance. As of December 31, 2025, assets under management amounted to CHF 5.3 bn..

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