



Wealth Management Research

David Lefkowitz, CFA®

Senior Equity Strategist

Responsibilities

Equity strategy, Utilities

Education

David Lefkowitz holds a B.S. in economics and a B.A. in history from the University of Pennsylvania.

Professional history

David has over 13 years experience as a securities analyst. He is currently Senior Equity Strategist as well as a corporate research analyst covering the utilities sector for UBS Wealth Management Research – Americas. Prior to joining UBS in 2006, David was a generalist equity analyst at hedge fund Thales Fund Management where he looked for investment opportunities across all sectors of the economy. Earlier, David managed Credit Suisse Asset Management's global telecommunications fund and also covered the media, telecommunications and electric utility sectors. He began his professional career at Goldman Sachs covering the wireless communications industry and, later on, as a member of Goldman's value investing team where he focused on the media and telecommunications sectors.

Professional affiliation

David is a Chartered Financial Analyst®.