

Balfour Capital Group & Atlasio Capital Partners Publish White Paper on Generational Shifts in Global Investing Behavior

YVERDON-LES-BAINS, SWITZERLAND, SWITZERLAND, June 10, 2025 /EINPresswire.com/ -- Balfour Capital Group, in collaboration with Atlasio Capital Partners, is pleased to announce the release of a new white paper titled "Generational Intelligence: Social Media, AI, and the Behavioral Shift in Global [Investing](#)." The

publication offers a timely and sophisticated analysis of how social media, artificial intelligence, and behavioral psychology are influencing investment behavior across generational lines.



The white paper is co-authored by Steve Alain Lawrence, Chief Investment Officer of Balfour Capital Group; Aariz Ery, Founder and CEO of Atlasio Capital Partners; and Erick Felipe Meier Jaramillo, Chief Investment Officer of Qstodia and Head of Macroeconomic Research at Atlasio. Their collaboration reflects a growing strategic alignment between Balfour Capital and Atlasio in the domains of behavioral finance, macroeconomic insight, and next-generation advisory platforms.

About the Authors:

Steve Alain Lawrence oversees global investment strategy at Balfour Capital Group, a firm managing over \$400 million in assets. His leadership integrates institutional rigor with forward-thinking analysis, particularly around investor behavior and portfolio psychology across age groups.

Aariz Ery, leads Atlasio Capital Partners, a firm focused on alternative assets, financial innovation, and next-generation advisory solutions

Erick Felipe Meier Jaramillo brings deep expertise in macroeconomic modeling and quantitative frameworks, serving as CIO at Qstodia.

Key Highlights:

Gen Z investors (18–25) are driven by identity-based investing, short-form content, and speculative tools like trading bots and meme stocks—yet maintain low trust in social media as a credible source of financial guidance

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Millennials (26–35) are described as “algorithmic pragmatists,” blending self-directed platforms with selective use of professional insights and real-time signals

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Gen X and Boomers (ages 44–70) are increasingly influenced by platforms like YouTube, Reddit, and Facebook, but remain grounded in long-term fundamentals, verifiable information, and personal advisory relationships

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This cross-generational study illustrates how trust, technology, and timing influence behavior—highlighting the need for advisors and institutions to tailor their strategies to meet divergent generational expectations. The collaboration between Balfour and Atlasio reinforces a shared commitment to delivering sophisticated, adaptive, and globally accessible investment intelligence.

“Understanding the emotional and technological influences that shape each generation’s financial decisions is now central to fiduciary excellence,” said Steve Alain Lawrence. “Our partnership with Atlasio reflects Balfour’s belief that behavioral insight is as vital as quantitative precision in modern investment management.”

The white paper is available for institutional partners, media, and clients via www.balfourcapitalgroup.com or by direct request to steve.lawrence@balfourcapitalgroup.com.

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