

SESSIONS

DAY 1 AGENDA: SFR EUROPE: ESG REGULATION, DATA & TCFD REPORTING - 05/09/2023

SFR Europe: ESG Regulation, Data and TCFD Reporting

5-6 September 2023
Cavendish Conference Centre
London

Registration & coffee

08:45 - 09:30

Chair's welcome

09:30 - 09:35

Moving from TCFD to ISSB

09:35 - 09:55

- Prospects for UK and international alignment within climate risk reporting
- Outlining the major similarities between TCFD and ISSB
- Exploring the differences between EU and ISSB

Participants

Lois Guthrie - Senior Technical Adviser, IFRS Foundation

How firms are currently delivering climate risk reporting

09:55 - 10:35

- Exploring the potential impact of the FSB sunseting TCFD
 - Ensuring Boards retain comparable interest in replacement climate risk reporting
 - Elevating future climate risk reporting frameworks in the minds of investors
- Further integrating TCFD outputs into investee companies to increase impact and relevance
- Updating risk management and governance practices owing to TCFD outputs
- Increasing emphasis on climate risk opportunity as much as risk
- How the ISSB standards are planned to act as a global baseline
- How users of disclosures are preparing for S1 and S2 of the ISSB standards
 - How preparers of disclosures should be preparing
 - Establishing metrics and measurement to enable comparability
- Engaging with investee firms to enhance impact and reporting

Participants

Lois Guthrie - Senior Technical Adviser, IFRS Foundation

Piera Ziedek - Team Lead, Integrated Reporting & Sustainability Services, DWS Group

Edo Schets - Head of Climate for Core Product Sustainable Finance Solutions, Bloomberg

Networking break

10:35 - 11:05

CSRD and future regulation of the data sector

11:05 - 11:45

- How investors are positioning themselves to benefit from CSRD
 - Handling the large volumes of data that is expected under CSRD
 - Generating decision-useful information from new investee data
- Exploring expectations around the quality of data received under CSRD
- Ensuring insights aren't lost through standardisation
 - Generating decision-useful information
- Supporting investees and portfolio companies to meet the requirements of CSRD
- How CSRD will dovetail with SFDR

Participants

Richard Burrett - Chief Sustainability Officer, Earth Capital

Charlie North - Managing Counsel, EMEA Public Policy & Government Affairs, BNY Mellon

Dan Neale - Social Themes Lead, Church Commissioners for England

Moderator: Anne-Marie Schoonbeek - Co-Founder and COO, KEY ESG

Realistic expectations for data within current disclosures

11:45 - 12:30

- Outlining the changing expectations for data completion within issuer disclosures
- The role of qualitative data within disclosures
- How the fund industry is looking to ensure standardisation and comparability of data
- Exploring the weighting funds are giving avoided emissions within their investment strategies
 - Avoiding the risk of double counting avoided emissions

Participants

Ellie Jones - Operations & Sustainability Manager, Green Investment Partners

Moderator: Alpesh Doshi - Managing Partner, Redcliffe Capital

Kate Hewitt - ESG & Impact Specialist, Montanaro Asset Management

Emile Lavergne - Climate Solutions Lead, Manifest Climate

Yiannis Bartzilas - Director of ESG Research & Insights, Muzinich & Co

Creating a best-in-class sustainable investing industry

12:30 - 12:50

- Streamlining disclosures, policy and frameworks to enhance sustainable investing performance
- How the UK is evolving its regulatory landscape to support investment opportunities

Participants

Virtual: Alexander Stafford MP - Chair, All Party Parliamentary Group on ESG

Lunch break

12:50 - 13:50

Meeting the holistic pan-European regulatory and disclosure requirements

13:50 - 14:35

- How regulation is shaping where money is being allocated
- Outlining the key differences between SDR and SFDR
 - Establishing the authority to use a domicile's regulation over the target market
- Incorporating SFDR and SDR in a manner that reduces admin and meets fair, clear and not misleading nature of both regulations
 - Meeting European regulations whilst futureproofing against further UK developments
 - Implications for data, reporting and impact frameworks
- Clarifying the overlapping terminologies
 - Assisting investor understanding
 - Reducing admin within marketing materials
- Key flash points with interoperability of regulations
- How disclosure and 'labelling' is working with each other
- Where to draw the line on classifying funds and underlying assets
- Prioritising the regulatory requirements to ensure sufficient resource is dedicated to them
 - Focusing on TCFD, SDR, SFDR
- The amount of strategy and innovation available within the regulatory framework

Participants

Rose Beale - Partner, Responsible Investment Lead, Findlay Park

Jonathan Walker - Associate Director, Sustainable Investment, Gresham House

Max Dawe - Sustainable Investing Analyst, Fidelity International

Moderator: Emma MacDowall - Head of Regulatory Developments, Manulife Asset Management

Nadia Humphreys - Head of Climate Finance and Regulatory Solutions, Bloomberg

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Aligning business processes to inform investment decisions

14:35 - 15:05

- Outlining how CSRD will change the sustainability investing landscape
- Exploring the business challenges of sustainability reporting for PEs and corporates
 - How evolving non-financial disclosure regulation is impacting reporting
 - Tools and strategies for data management and data processing
- The realities of report creation and maintenance
 - Outlining the technologies available to address these challenges
- Highlighting the value of implementing an integrated IT architecture
 - Optimising sustainability reporting
 - Future-proofing sustainable investing

Participants

Diana Calmic - Management Consultant, Sustainability Lead, Core SE

Fabian Meyer - Managing Director, CORE

Afternoon break

15:05 - 15:35

SFDR: Reverting back from labelling to disclosure

15:35 - 16:20

- The steps needed to be taken to revert SFDR back from labelling to disclosure regulation
- How much SFDR is genuinely helping clients understand the level of ESG sophistication they require
 - How asset owners are viewing SFDR
 - How labels correlate to expectations
- The level that SFDR is encouraging genuine impact
 - Restructuring the regulation to ensure equal weighting and consideration between the three
- Expected future reclassifications between Articles 6, 8 and 9
- The likely growth of 'Article 8++' funds

Participants

Eoin Fahy - Chief Economist, Head of Responsible Investing, KBI Global Investors

Manooj Mistry - COO, HANetf

Elizabeth Lance - Assistant Chief Counsel, ICI Global

Moderator: Molly Scott Cato - Professor of Finance, University of Roehampton

Investment priorities for the upcoming 12 months

16:20 - 17:05

- The areas where funds are targeting to make a genuine difference
- The role of capital markets in the broad transition
 - How investors are planning to stabilise the energy transition in light of the past year's global developments
- How investors are considering factors surrounding materiality
- Methods for getting to net zero in the most pragmatic and economically efficient manner possible
 - Clarifying misconceptions around the path and timelines to get there
- Prioritising physical risks, transition planning and adaptation funding

Participants

Martin Frandsen - Portfolio Manager, Principal Asset Management

Bixuan Xu - Portfolio Manager, Royal London Asset Management

Sergio Henrique Collaco de Carvalho - Head of Impact, Planet First Partners

How institutions are approaching transition investing

17:05 - 17:45

- The areas investors are prioritising to make a greater difference
 - Assisting development within emerging markets
- Establishing an agreed definition of transition investing to encourage greater institutional investment
- Utilising the UK & European regulatory framework to assist with transition investing
 - Navigating the regulatory frameworks of domiciles and local jurisdictions
- Managing adaptation risk and working within the new climate normal
- Showcasing transition risk within climate risk reporting
- Understanding and managing transboundary risks
 - How the interconnectedness of global supply chains amplifies climate shocks
 - Understanding the disproportional impact on developing economies
- How are transition plans affecting existing decisions around investment
- Exploring the depth of due diligence required to assess transition plans

Participants

Olena Borodyna - Senior Transition Risk Analyst, ODI

Saule Ualiyeva - Product Strategy & Strategic Marketing, BNP Paribas

Gülhiz Şen - Senior Legal Counsel, ING

Victoria Walker - Sustainability Analyst, ILX Fund Management

Ashim Paun - Head of Sustainable Investing, Triton Investment Partners

Evening drinks reception & networking

17:45 - 18:45

SCHEDULE

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10:00	10:35 - Networking break
11:00	11:05 - CSRD and future regulation of the data sector 11:45 - Realistic expectations for data within current disclosures
12:00	12:30 - Creating a best-in-class sustainable investing industry 12:50 - Lunch break
13:00	13:50 - Meeting the holistic pan-European regulatory and disclosure requirements
14:00	14:35 - Aligning business processes to inform investment decisions
15:00	15:05 - Afternoon break 15:35 - SFDR: Reverting back from labelling to disclosure
16:00	16:20 - Investment priorities for the upcoming 12 months
17:00	17:05 - How institutions are approaching transition investing 17:45 - Evening drinks reception & networking

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DAY 2 AGENDA: SFR EUROPE: ESG REGULATION, DATA & TCFD REPORTING - 06/09/2023

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Networking & coffee

08:45 - 09:40

Chair's welcome

09:40 - 09:45

Participants

Onur Tosun - Director of Cardiff Sustainable Finance Research Group, Cardiff University

DEBATE: What should the role of an impact fund be?

09:45 - 10:30

SFDR Article 9 has positioned impact funds against brown assets and has inadvertently created a 'label' of what an impact fund should be. Fund managers are now determining how best to support the transition to a low-carbon economy. Our leading impact investors debate the merits of prioritising funding green assets vs actively managing brown assets; divestment vs engagement.

Participants

Roman Cassini - Head of ESG, Hosking Partners

Rhyadd Keaney-Watkins - Head of ESG, Arjun Infrastructure Partners

Seb Beloe - Partner, Head of Research, WHEB Asset Management

Cornelia Frentz - Director of Governance & Sustainable Investing, European Circular Bioeconomy Fund

Moderator: Onur Tosun - Director of Cardiff Sustainable Finance Research Group, Cardiff University

Exploring portfolio construction under SFDR

10:30 - 11:15

- Gauging current investor demand
- The likely size of the product market for Article 8 funds
 - Exploring the future prevalence for '8++' vehicles
- The necessary steps to increase the prominence of Article 6 for sustainable investors
- The prevalence of active investing strategies and ownerships within sustainable funds
- Current level of resource that are required to monitor and translate regulation into products
- How fund managers are tying their fees to impact

Participants

Ophélie Mortier - Chief Sustainable Investment Officer, Degroof Petercam Asset Management

Yasmin Le - Sustainability Specialist, LaSalle Investment Management

Finian Power - Head of ESG Policy and Regulation, First Sentier Investors

Moderator: Onur Tosun - Director of Cardiff Sustainable Finance Research Group, Cardiff University

Networking break

11:15 - 11:45

Reversing biodiversity decline

11:45 - 12:30

- Establishing why there is now a focus on biodiversity and what the investment community is looking to achieve
 - Clarifying what data we should be looking to capture
- Knowing a realistic ask for investee portfolio companies
- Agreeing a common benchmark on what constitutes natural capital and biodiversity focused investing
- Targeting the big picture drivers of biodiversity loss
 - Looking beyond solely deforestation
 - Exploring land use loss
 - Invasive species and loss of habitat
- How TNFD will further channel investing in biodiversity
- Creating common metrics and measurement at an early stage in biodiversity investing
- Measuring the impact of financing
- Avoiding a trade-off between saving biodiversity and enabling the low carbon transition

Participants

Sam Anthony - Sustainable Equity Analyst, Ninety One

Heidi Snæbjarnardóttir - Sustainability Manager, Landsbankinn

Eloise Dean - ESG & Sustainability Analyst, IK Partners

Moderator: Chris Perceval - Senior Market Engagement Director, S&P Global Sustainable1

Growing the social investing mandate

12:30 - 13:15

- How investors are delivering social impact through investments
- Finding the acceptable balance between making money vs making a difference
- Growing the social impact investing market
- Assessing the FCA regulation around social impact investing
- Gaining comparable data to inform decision making
- The current levels of collaboration within social investors to grow the sector and achieve greater levels of impact
- Current expectation levels from asset owners and institutional investors

Participants

Moderator: James Westhead - Head of Engagement, Big Society Capital

Aamil Ghani - Compliance & ESG Officer, Lakestar Advisors

Michael Carrett - Partner, Montagu Private Equity

John Gilmore - Portfolio Manager, Impact Equity, Martin Currie

Tom Parachini - Global Head of Legal & Regulatory, Funding Circle

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Lunch break

13:15 - 14:15

Achieving impact within emerging economies

14:15 - 15:00

- Gaining an accurate picture of the need on the ground
- Exploring sources and methodologies to create investment-useful data and support future investments
- Exploring governance requirements in developing economies
- Encouraging institutional money away from 'safe' pure-play ESG mandates aimed at developed countries and economies
 - Enabling reporting to provide greater insight into companies that aren't ESG scored
 - Avoiding inequality in capital flows
- How firms are using impact reporting to measure results and mitigate greenwashing risks

Participants

Matthew Hodgkinson - Portfolio Manager, Confluence Investors

Virtual: Mahamadi Balima - Head of Sustainable Finance, Autorité des Marchés Financiers de l'Umoa (Côte d'Ivoire)

Arvind Chari - Chief Investment Officer, Q India UK

Moderator: Onur Tosun - Director of Cardiff Sustainable Finance Research Group, Cardiff University

Assessing whether sovereign debt can be sustainable

15:00 - 15:45

- Exploring the common situations when sovereign debt is suitable for a sustainable investing strategy
- The action needed to enable sustainable finance to further motivate governmental action
- Which frameworks should be used to view sustainable fixed income
- Whether investors should receive low or high yields based on project risk

Participants

Kroum Sourov - SRI Sovereign Analyst, Candriam

Jo Richardson - Head of Portfolio Strategy, Anthropocene Fixed Income

David Zahn - Head of European Fixed Income, Franklin Templeton

Moderator: Onur Tosun - Director of Cardiff Sustainable Finance Research Group, Cardiff University

Sustainable investing within private markets

15:45 - 16:30

- Ensuring economic benefits aren't a trade-off for sustainability
- How ESG is treated within the due diligence process
- The current availability of data for private markets
- Supporting portfolio companies achieve sustainability aims
- Fulfilling SFDR and disclosure requirements when you're a step removed from portfolio companies
- Translating public-focused regulation such as SFDR into private markets
- How private investors are considering adaptation risks
- Quantifying the financial impact of adaptation risk through enhanced scenario planning

Participants

Moderator: Niamh Whooley - Managing Director, Head of Sustainable Investing, Pemberton Asset Management

Claire Hedley - ESG Director, 17Capital

Beatrice Boehm - Principal, Green European Tech Fund, Munich Venture Partners

Lucia Mancisidor - Senior Associate, Federated Hermes Private Markets

Anastasia Guha - Global Head of Sustainable Investment, Redington

Close of conference & networking

16:30 - 17:30

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