

### Registration & coffee

08:30 - 09:15  
Main conference

### Chair's welcome

09:15 - 09:25  
Main conference

### Participants

**Altat Cassam** - Head of Compliance Advisory, Barings Asset Management

### Shaping disclosures to provide decision-useful investment information

09:25 - 09:55  
Main conference

- The current work of the ISSB: Moving into the next phase of adoption and implementation
- Exploring voluntary vs regulatory adoption of reporting frameworks
- Delivering a consistent, comparable baseline for disclosures
- How the investor community can work with standards setters
- Current progress on building transition plan reporting frameworks

### Participants

**Mardi McBrien** - Chief of Strategic Affairs & Capacity Building, IFRS Foundation

### The opportunity within private markets to enhance global sustainability

09:55 - 10:40  
Main conference

- Exploring stewardship and support of portfolio companies to enhance sustainability
- The current benchmark for available and actionable ESG data
  - Whether CSRD will provide structured insights of too much data
  - Current harmonisation within existing datasets
- How investors are incorporating ESG risks within investment due diligence
- How sustainability goals are affecting manager selection
- Manager selection
- Due diligence
- Private equity & credit

### Participants

**Claire Hedley** - ESG Director, 17Capital

**Erik Thijs Wedershoven** - Director, ESG, NPM Capital

**Luz Martinez** - Sustainability Manager, ILX Fund

**Amos Wittenberg** - CEO & Co Founder, Unwritten

### Networking break

10:40 - 11:10  
Main conference

### Mastering the changing climate risk regulatory environment

11:10 - 11:40  
Main conference

- Using Location Risk Intelligence to respond to climate risk reporting obligations in an evolving disclosure landscape
- Gain insight into the evolving landscape of different climate risk reporting standards
- Understand the various physical climate risk data requirements of relevant reporting frameworks
- Tool Demonstration: Find out how Location Risk Intelligence can be used to identify material physical risk and respond to different climate risk regulations

### Participants

**Calandra Eckert** - ESG Expert, Risk Management Partners, Munich RE

### Prioritising data methodologies as much as data outputs

11:40 - 12:25  
Main conference

- Who is using data reporting by financial institutions?
- Reducing the risk of over-reliance on data outputs over methodologies
- Striking the balance between quantity and quality of information
  - Ensuring granularity isn't at the cost of financial materiality
- The correct usage of metrics and measurement benchmarking tools
- Gaining greater proliferation and insights from forward-looking data
- How clients are integrating data into their frameworks
- Reducing areas of conflict within standards and policy
- How current datasets are providing alpha signals
  - How data can better help facilitate capital into impactful areas

### Participants

**Alpesh Doshi** - Managing Partner, Redcliffe Capital

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

**Alfred Sandeman** - ESG Analyst, Candriam

**Vincent Lecat** - Head of Impact and ESG, Development Partners International

### How regulatory development is impacting the transition

12:25 - 13:10  
Main conference

- Areas of policy development to enable the transition to a low carbon economy
  - Enhancing interoperability
  - Should 'transition' be a separate label within major global regulatory initiatives?
  - How global transition taxonomies are affecting investment strategies
- How investors are measuring success within transition finance and investing
- How clients are measuring success within transition finance and investing
- Managing fiduciary duty alongside climate goals
- The role of public finances within enabling the transition
- Outlining our realistic expectations for what transitions plans will achieve

### Participants

**Martin Frandsen** - Portfolio Manager, Principal Asset Management

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

**Olena Borodyna** - Senior Transition Risk Analyst, ODI

### Lunch break

13:10 - 14:10  
Main conference

### Reporting for CSRD & ESRS

14:10 - 14:40

Main conference

- Building initial capabilities to meet CSRD reporting requirements
  - Completing a gap analysis to understand areas of improvement
- How firms have been completing their double materiality assessment
- Reviewing disclosure templates
- How CSRD reports are being produced alongside sustainability statements
- Building a data strategy to provide holistic insight
  - Exploring methodologies around financial quantification
  - Creating a data collation and management strategy
- Ensuring interoperability of data with CDP and GRI through streamlining operations
- Gaining insight into the value chain
- Getting the correct data mix between proprietary and third party data

### Participants

**Tony Christensen** - Senior Manager, Sustainable Investments Lead, Position Green

**Phil Cliff** - Director, Sustainable Investing (Climate), Fidelity

**Claire van der Grift** - Director, Sponsor Coverage Europe & Africa, Rabobank

**Mahesh Talawdekar** - Sustainability Reporting Manager, Dentsu

### SFDR & SDR: Redefining fund types as the market matures

14:40 - 15:25

Main conference

- How funds are measuring performance to aid market understanding
  - Aiding investor understanding as the market matures
- Exploring existing portfolio construction under SFDR
  - How the ongoing consultation might change this
- Whether existing regulation is aiding or abetting transition investing
- How SFDR has impacted the usability of funds for investors
  - What did the migration of article 9 products into article 8 mean for investor clarity?
- How funds are managing the potential for greenwashing or greenhushing
- Charting the ongoing resource required to meet regulatory requirements
- Outlining future areas where greater interoperability can be achieved

### Participants

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

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

**Grégoire Hug** - CEO, WeeFin

### Afternoon break

15:25 - 15:55

Main conference

### Balancing fiduciary responsibility against ESG performance

15:55 - 16:40

Main conference

- Exploring the purpose of a sustainable investment strategy
- How funds are considering material risks and financial materiality
  - Incorporating sustainable investment themes with a reduced financial link
- Assessing the current end-investor and asset owner expectations
- Considering the viability of biodiversity as a viable investment strategy
  - The potential for greater regulatory intervention to enhance investment
- Gauging the limits of investors
- How investors are meeting asset owner reporting expectations
- Moving from retrospective reporting to forward-looking investing
- The extent that investors are focusing on emerging markets to achieve impact
- Changing focus from small impactful investments to more thematic/integrated investing
- Gaining greater data and insights
- How do we view the current progress achieved?

### Participants

**Roman Cassini** - Head of ESG, Hosking Partners

**Jo Richardson** - Head of Portfolio Strategy, Anthropocene Fixed Income

**Jonathan Tudor** - Investment Partner, Clean Growth Fund

**Ravi Bhatt** - Head of Responsible Investment, Apis Partners

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