

SESSIONS

LAST YEAR'S DAY 1 AGENDA: ESG REGULATION, DATA & TCFD REPORTING

ESG Regulation, Data and TCFD Reporting

September 2023
Venue TBC
London

Registration & coffee

08:00 - 09:00

Chair's welcome

09:00 - 09:05

Participants

Kevin Haines - Head of Social Policy , Bedford Row Capital

Promoting good practice and trust in ESG

09:05 - 09:35

- Outlining the recent and upcoming work of the FCA
- Developing product and investment labelling to enhance consumer trust
- Specifying clear and objective criteria to underpin the labels
- Providing confidence through minimum standards
- Highlighting the integration and synergies with SFDR
- Integration with the UK Government's SDR

Participants

Mark Manning - Technical Specialist, Sustainable Finance and Stewardship , Financial Conduct Authority (FCA)

Aligning portfolios under articles 6, 8 and 9

09:35 - 10:20

- How organisations are aligning their investment portfolios to articles 6, 8 and 9
 - Where the lines are being blurred between article 6 and 8 funds
 - Is there too much vagueness between article 8 and 9 funds?
 - The future potential for litigation
- Addressing the lack of data and consistent methodologies to move from article 6 to 8 and 9
 - The current cost/benefit of investing in IT to achieve this
- Assessing where to draw the line when following the taxonomy for article 8 funds
 - Agreeing what it takes to determine that you are an article 8 fund
- Exploring how many article 9 managers have sustainable investment objectives
 - Moving beyond the box ticking of SFDR
- Reporting against all 52 indicators under Article 8 with credible estimations

***Molly Scott Cato** is a former MEP and acted as the European Parliament Rapporteur on Sustainable Finance and a negotiator during the creation of the SFDR.*

Participants

Sondre Myge Haugland - Head of ESG , Skagen Funds

Rebecca Ogg - Senior Legal Counsel , Fidelity International

Paula Singliarova - Head of Sustainability & Stewardship , Arabesque Asset Management

Molly Scott Cato - Professor of Finance , University of Roehampton

Fund panel: Building a sustainable investment portfolio

10:20 - 11:05

- Exploring how allocators are building their portfolios in line with regulatory frameworks
- How investor considerations are being used to shape product
- Offering sustainable investment strategies with private assets
- Mapping investor appetite in the US and Asia
- The current research and methodologies being developed to aid investment

Participants

Jonathan Walker - Sustainable Investment Manager , Gresham House

Matthew Hodgkinson - Portfolio Manager , Confluence Investors

Jovita Razauskaite - Portfolio Manager , NNIP

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

Joshua Cole - Founder & Portfolio Manager , Green Investment Partners

Networking break

11:05 - 11:30

How is the current regulation serving the investor?

11:30 - 12:15

- Exploring the pros and cons to the investor of the current regulation
- Overcoming the challenges to investor benefit that the regulatory framework may bring
- How can a retail investor gain the information they need as quickly as possible to make investment decisions?
- How additional resource to service data is impacting fees

Participants

Cindy Rose - Head of Responsible Capitalism , Liontrust Asset Management

Iain Richards - Head of Responsible Investment , Colombia Threadneedle

Rose Easton - EMEA Signatory Relations Director , UN PRI

Will Martindale - Group Head of Sustainability , Cardano

Raoul Kohler - Senior Policy Advisor , AFM

Investor and asset owner appetite

12:15 - 13:00

- Assessing how much of a motivation sustainability is against performance
 - Gauging the impact upon product
- Serving climate-minded investors who are seeking short-term gains
- How long-only investors are prioritising decisions based on climate risk
- How asset managers are helping asset owners meet their own sustainability regulatory requirements

Participants

Alina Tuleugazy - Investment Strategist , Allianz Investment Management

Piet Hein Schram - Expert , Energy Efficient Mortgages NL Hub

Sofia Bartholdy - Net Zero Lead , Church Commissioner for England

Marc Moser - Head of Impact , Lightrock

Fabian Meier - Legal Counsel , Swiss Re

Lunch break

13:00 - 14:00

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Building a risk-aware strategy for TCFD reporting

14:00 - 14:35

- Compliance challenges and risks with the TCFD disclosure
- The importance of transparency and how to achieve it
- How to produce sustainability reports with the same rigour, assurance and global comparability as annual financial reports

Participants

Andromeda Wood - VP of Regulatory Strategy , Workiva

Unlocking investment by embedding ESG principles

14:35 - 15:00

- How the British Government are working to embed sustainable business practices within corporates
- Outlining the future roadmap for strengthening sustainability practices and investment
- Exploring the future governmental expectations upon the financial services sector

Participants

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

Engagement for real world outcomes

15:00 - 15:45

- Exploring the move of investors to help catalyse change in corporates
- Routes to achieving change through proxy voting, active ownership and impact investing
 - Aligning responsible investment with the UK stewardship code and PRI
- The wider implications for society and the environment
 - Achieving a difference within the changing geopolitical realities
- Assessing the role of government vs the private sector in creating change
 - Is it true that only governments can or should make a difference?
 - Creating a supportive environment & regulation with blended finance
- Outlining the inherent complexity in measuring outcomes or impact
- Measuring the multi-dimensional nature of impact; weighing E and S impacts
- Proving the investor contribution to ultimate impact
- The application of divestment as a tool for change

Participants

Rose Beale - Partner, Responsible Investment Lead , Findlay Park

Rupert Sefting - Head of Corporate Finance & Stewardship , M&G

Laura Blanco - Global Head of ESG – Wealth Management & Insurance , Santander

Stephanie Niven - Portfolio Manager, Global Sustainable Equity , Ninety One

Afternoon break

15:45 - 16:15

Corporate panel: Integrating ESG across the business

16:15 - 17:00

- How asset management engagement is driving change across the business
- Charting how current consumer demands are affecting products
- Integrating current transition planning
- Steps undertaken to disclose relevant information to asset managers and owners

Participants

Lauri Saraste - Chief Actuary , Localtapiola Life Insurance

Kristina Beadle - Head of Carbon Services , Inspired PLC

Liz Wilks - European Director, Sustainability , APP

Julia Jasinska - Principal Policy Advisor , CBI

Achieving data comparability

17:00 - 17:45

- How allocators are using available data to inform investment decisions
- Exploring when to use estimations
- Agreeing on common definitions and metrics to effectively invest sustainably
- Charting the resource involved in data provision and appetite to increase this
- Implementing safeguards to provide transparent and credible data
- The potential for consistency across data sources
- Understanding the potential role of an European Single Access Point (ESAP)

Participants

Martina Macpherson - Visiting Fellow , Henley Business School

Joss Blamire - Infrastructure Director , GRESB

Alpesh Doshi - Managing Partner , Redcliffe Capital

Corinne Neale - Managing Director, Global Head Data & Platforms ESG Applications , BNY Mellon

Evening drinks reception & networking

17:45 - 18:45

SESSIONS

LAST YEAR'S DAY 2 AGENDA: ESG REGULATION, DATA & TCFD
REPORTING - 07/09/2022

ESG Regulation, Data and TCFD
Reporting

September 2023
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London

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08:00	08:00 - Registration & coffee
09:00	09:00 - Chair's welcome 09:05 - Promoting good practice and trust in ESG 09:35 - Aligning portfolios under articles 6, 8 and 9
10:00	10:20 - Fund panel: Building a sustainable investment portfolio
11:00	11:05 - Networking break 11:30 - How is the current regulation serving the investor?
12:00	12:15 - Investor and asset owner appetite
13:00	13:00 - Lunch break
14:00	14:00 - Building a risk-aware strategy for TCFD reporting 14:35 - Unlocking investment by embedding ESG principles
15:00	15:00 - Engagement for real world outcomes 15:45 - Afternoon break
16:00	16:15 - Corporate panel: Integrating ESG across the business
17:00	17:00 - Achieving data comparability 17:45 - Evening drinks reception & networking

Networking & coffee

08:00 - 09:00

Chair's welcome

09:00 - 09:15

Participants

Kevin Haines - Head of Social Policy , Bedford Row Capital

Data collection and deployment

09:15 - 09:45

- Finding data to demonstrate sustainability of investments
- Exploring the volume and depth of data collection that analysts require
- Meeting the ongoing cost of data acquisition and calculation
- How data providers are prioritising their data collation initiatives
- Understanding the current use of estimates to bridge data gaps
- Where the current biggest gaps for data collation exist

Participants

Elena Philipova - Director, Sustainable Finance, Data & Analytics , London Stock Exchange Group

Modelling: Quantifying Scope 3 and supply chain emissions

09:45 - 10:30

- Tools and techniques to ensure traceability of information
- Upskilling teams to be able to collect and interrogate the data
- Gauging the current expectations around transparency and assurance of data
- The potential for AI and innovative technology to fill data gaps
 - How these tools are providing assurance

Participants

Kristina Beadle - Head of Carbon Services , Inspired PLC

Will Ennett - Head of Sustainability , TalkTalk

Corina Dospinoiu - Head of CSR , Auchan Retail

Networking break

10:30 - 11:00

SCHEDULE

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The ongoing convergence of disclosure frameworks

11:00 - 11:45

- What does the convergence of standards and guidelines mean for AMs?
- Reaching consensus over the use, expectations, harmonisation and comparability of disclosures
- Exploring how investors are using the current sustainability disclosures
- Using the disclosure regimes to fundamentally change how issuers report carbon targets
 - Moving beyond governance, risk and management of impacts to enhanced accuracy
- Moving away from subjective risk and opportunity disclosures
- Assessing future expectations from the ECB, SEC and the EBA's GTAR & GAR
 - Overlap with TCFD
- The role of CSRD, ISSB and EFRAG

Participants

Phil Fitz-gerald - Director, Financial Reporting Lab , Financial Reporting Council

Valeria Cipollone - Policy Officer , Ministry of Economy & Finance, Italy

Andromeda Wood - VP of Regulatory Strategy , Workiva

Luke Nelson - Executive Director, Head of Sustainability & ESG Engagement , JP Morgan

Utilising social data and disclosures

11:45 - 12:30

- Exploring how funds are including building social considerations into their sustainable investment strategies
- Increasing the transparency of social data
 - Exploring the current sources and agreed consensus
- Assess how social data is considered alongside environmentally focused taxonomies

Participants

Lars Hagelmann - Head of Fund Management , Big Issue Invest

James Westhead - Head of Engagement , Big Society Capital

Oscar Warwick Thompson - Head of Policy & Communications , UKSIF

Lunch break

12:30 - 13:30

Achieving consensus on metrics & measurement

13:30 - 14:15

- Gaining assurance around disclosure methodologies
- Understanding current industry expectations and minimum requirements
- Charting the current willingness to disclose negative impact
- Aligning metrics with TCFD and wider non-financial disclosures
- The current work around disclosing forward-looking metrics

Participants

Kroum Sourov - SRI Sovereign Analyst , Candriam

Torun Reinhammar - Senior Account Manager, Investor Engagement , CDP

Jigisha Lock - Head of Global Sustainability Analytics, Data & Operations , Credit Suisse

Incorporating biodiversity into investment decisions

14:15 - 15:00

- Developing sustainability strategies that incorporates biodiversity data
- Mapping the progress of the TNFD
 - Steps investors should be taking to prepare for September 2023 launch
- How funds are currently gaining access to biodiversity data
- Building a consensus on biodiversity metrics, measurement and standards
- Interaction between nature and climate-related risks and issues.

Participants

Carolina Descio - Senior Manager , The Carbon Trust

Clint Flores - Head of ESG , Bank of Valletta

Alessia Lenders - Associate, Real Estate , SLM Partners

Close of conference & networking

15:00 - 16:00

TIME

08:00

08:00 - Networking & coffee

SCHEDULE

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