

SESSIONS

DAY 1 AGENDA: LIVE SESSIONS GMT TIME ZONE - 24/11/2020

European Sustainable Investment Summit

24 - 25 November 2020

Virtual conference & networking
Live-streamed (UK time, GMT) | On-demand after

Log into the app: Browse the attendee list and set up meetings for later in the day

08:45 - 09:15

Log into the app, start connecting with delegates in the virtual exhibition hall, and schedule video meetings in advance.

Chair's opening remarks

09:15 - 09:20

European Sustainable Investment Summit

Participants

Abbie Llewellyn-Waters - Fund Manager, Jupiter Asset Management

Chair's opening remarks

09:15 - 09:20

UCITS & AIFMD London

Participants

Chair: Andrew Kehoe - Head of Legal, KB Associates

The view from above; Sustainable and responsible investing mid- and post-crisis

09:20 - 10:10

European Sustainable Investment Summit

- Key takeaways for managers and investors from evolving crises in 2020; COVID-19, social unrest
 - Positive effect of ESG in portfolio strategies during market sell-offs
 - Importance of ESG performance indicators for long-term value creation
 - Potential for heightened interest and adoption of ESG investing
- ESG adoption in different jurisdictions and asset classes; Where are we now?
 - Existing barriers to ESG investing; remaining taxonomy issues; challenge of comparing data across asset classes and markets
 - Is globalisation good or bad for sustainability?

Participants

Louise Dudley - Portfolio Manager, Global Equities, Federated Hermes

Suresh Mistry - Director, Alquity Investment Management

Neil Brown - Chief Risk Officer, Earth Capital Limited

Mark Harland - Head of Governance and Responsible Investment, GAM Investments

Ben Dear - CEO, Osmosis Investment Management

Key European regulatory developments and their impact on asset managers

09:20 - 10:10

UCITS & AIFMD London

- Fallout from COVID-19; European regulatory outlook for asset managers:
 - Huge need for economic recovery; need for growing EU capital markets (rebooting CMU) and facilitating the investing experience (MiFID quick fix and review)
 - European Commission focusing the path to recovery on sustainable finance and digital
 - Addressing the retirement savings issue
 - UK-EU relationship: impact of new prudential regime for investment firms; settlement discipline
- EU policymakers calling for more regulations:
 - Concerns about liquidity management; MMFs; ETFs
 - Focus on supervision and enforcement and suggestion to strengthen ESMA competences
 - AIFMD review will impact UCITS; delegation; substance
 - Investor protection (including as part of CMU): value for investors, increased scrutiny on costs and charges, inducements, quality of advice, transparency/better disclosures (PRIIPS)

Participants

Patrice Bergé-Vincent - Managing Director, ICI Global

Liz Moxham, Independent Senior Compliance Manager - Technical

James Ross - Head of Regulatory Developments EMEA, Columbia Threadneedle Investments

Federico Cupelli - Senior Regulatory Policy Advisor, EFAMA

Evolving ESG regulatory requirements in Europe; Impact for investors and asset managers

10:10 - 11:00

European Sustainable Investment Summit

- Evolving regulatory and policy challenges in Europe
 - EU Action Plan – Where are we now?
 - Sustainable Finance Disclosure Regulation (SFDR) coming into force in March 2021
 - How are firms implementing mandatory sustainability disclosures?
 - EU Climate Transition Benchmarks and EU Paris-aligned Benchmarks
 - ESG amendments to MiFID II; suitability requirements and product governance
- Impact of changing regulation on distribution; how should managers respond?

Participants

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

Mandy Kirby - Chief Strategist and Co-Founder, City Hive

Thomas Tayler - Senior Counsel, Aviva Investors

Michael Maldener - Managing Director and Conducting Officer, Nordea Investment Funds

Commercial overview; Evolving fund flows and sales trends in Europe

10:10 - 11:00

UCITS & AIFMD London

- How has the industry coped with recent crises?
 - Flows in Europe – what's trending; where, why?
- How have different strategies been faring?
- Evolving investor demands
- What's on the horizon?
 - Global factors; US-China trade war; impact so far
- What role will the asset management industry play on the road to economic recovery?

Participants

Nick Burgess - Head of Product Strategy, EMEA, AllianceBernstein

Peter Preisler - Managing Director, Head of Europe & Africa, Oaktree Capital Management (UK) LLP

Cora Gibbons - Managing Director, International Product, Nuveen

Networking break; connect in the virtual networking lounge

11:00 - 11:30

Schedule 1:1 video calls in advance, or have spontaneous calls and group conversations with delegates in the virtual exhibition hall

Designing and implementing a future-proofed investment strategy

11:30 - 12:20

European Sustainable Investment Summit

- Defining investment principles for strategy selection, decision-making
 - Aims; ESG considerations, risk appetite
- Successfully integrating SDGs; practical examples, dos and don'ts
 - Applying SDGs to different sectors; interpreting appropriate materiality
- Effective monitoring; internal structures; outsourcing opportunities vs in-house management; practical solutions

Participants

Peter Mennie - Global Head of ESG Integration and Research, Manulife Investment Management

Michael Canfield - Co-Portfolio Manager, Man GLG

Giulia Guidi - Head of ESG, NextEnergy Capital

Samantha Lamb - Head of ESG, Fixed Income, Aberdeen Standard Investments

Dirk Hoozemans - Fund Manager, Triodos Investment Management

Evolving impact of Brexit on the industry

11:30 - 12:20

UCITS & AIFMD London

- How has COVID-19 impacted Brexit for asset managers?
- Brexit transition: How are different market participants responding?
 - Asset managers restructuring, asset migration; changing business models
 - ESMA stepping up its co-ordinated approach to supervision
- Post-Brexit dynamics; opportunities in various domiciles
 - MiFID Third Country equivalence; new requirements, impact for managers
 - To what extent will the UK remain an attractive institutional market post-Brexit?
 - UK asset managers marketing into the EU under UCITS and AIFMD
 - MiFID implications
 - How to remain relevant; encouraging continued engagement

Participants

Kyra Brown - Regulatory Development Manager, Aviva Investors

Shika Soni - Regional Head of Legal, Europe & Middle East, Principal Global Investors

Brian Dunleavy - Associate Director, KB Associates

Sven Lorenz - Head of Product, Nordea Investment Funds S.A.

The hunt for authenticity: Effective and responsible marketing of ESG funds

12:20 - 13:10

European Sustainable Investment Summit

- Need for greater oversight of how funds are marketed and described
 - Fines for misleading labelling; risk of damage to investor trust
- To what extent will the new taxonomy framework and EU Ecolabel for financial products help in practice?
 - Potential unintended consequences; taxonomy mainly designed for private markets; will it apply well to other markets?
- Strategies for responsible marketing
 - Creating clearer product labels; grading funds into responsible investment categories; scoring the subcomponents of ESG

Participants

Arlita Majoch - Partner, Auriel Equity Investors

Maggie Loo - Partner, Client & Strategy Development, Bridges Fund Management

Manfred Schepers - Founder, ILX Fund

Abbie Llewellyn-Waters - Fund Manager, Jupiter Asset Management

The cross-border distribution landscape in Europe; The road ahead

12:20 - 13:10

UCITS & AIFMD London

- Distributing in Europe; evolving challenges and opportunities
- Update on the European Commission's directive on cross-border distribution
- Marketing non-EU AIFs into the EU; new rules in 2021
- AIFMD Review; removing barriers to cross-border distribution
- Increased industry restructuring; impact on distribution
- Model portfolios – sufficiently robust? How are they performing?

Participants

Louise Harris - Chief Compliance Officer, Abbey Capital

Serena McMullen - Senior Associate, aosphere LLP

Julian Mayo - Chief Investment Strategy, Universal Investment

Kunal Grover - Business Development Director, Zeidler Legal Services

Networking break; connect in the virtual networking lounge

13:10 - 14:20

Schedule 1:1 video calls in advance, or have spontaneous calls and group conversations with delegates in the virtual exhibition hall

Evolving ESG commercial trends and investor demands

14:20 - 15:10

European Sustainable Investment Summit

- Developing fund flows and commercial trends; how have ESG flows fared through the pandemic?
- Evolving investor expectations; where is ESG demand coming from, and how is it changing? What are the jurisdictional trends?
 - How is portfolio allocation evolving?
 - To what extent do investors want ESG products vs. impact products?

Participants

Mark Burrows - Head of Investor Relations, Quinbrook Infrastructure Partners

Ewa Jackson - Director, Sustainable Investing, BlackRock

Melissa Hill - Co-Founder, Blackheath-Eleos Enhanced ESG Fund

Justina Deveikyte - Associate Director, European Institutional Research, Cerulli Associates

Successfully launching funds in Europe; practical insight

14:20 - 15:10

UCITS & AIFMD London

- Regulatory considerations; the differences between launching UCITS and AIFs; requirements
- Local marketing requirements across Europe; comparing and contrasting
- Upcoming MiFID regulatory changes that are critical for a successful launch
- Upcoming ESG regulations that are critical for a successful launch
- Main variables that impact success; strategy, credibility, infrastructure, differentiating your offering

Participants

Moderator: Robert Childs - Head of International, Prescient Fund Services (Ireland)

Sarah Wrather - Senior Legal Counsel, Campbell Lutyens

Nic Spicer - UK Head of Investments, PortfolioMetrix

Chris Bands - Vice President, Goldman Sachs

Managing climate-related financial risks and opportunities

15:10 - 16:00

European Sustainable Investment Summit

- Climate-related financial risk considerations; strategies for improving resilience
 - Scenario analysis; managing exposure to climate risk
- Integrating climate change into the investment process
 - Developing new investment vehicles and products
 - Improving climate-related data

Participants

Phil Cliff - Director of Sustainable Research, M&G

Vikram Raju - Head of Emerging Markets, Morgan Stanley Alternative Investment Partners

Edward Mason - Director, Generation Investment Management LLP

Maria Lombardo - Head of Responsible Investment EMEA, Invesco

Faith Ward - Chief Responsible Investment Officer, Brunel Pension Partnership Limited

Evolving ManCo models; Challenges and opportunities in Europe

15:10 - 16:00

UCITS & AIFMD London

- Evolving ManCo trends in Europe; what's driving demand?
 - Increasing number of AIFMs and Super ManCos
 - Industry consolidation
- How has COVID-19 impacted ManCos?
 - Liquidity risk management, performing oversight
- Key challenges facing 3rd Party ManCos
 - Increasing regulatory scrutiny; substance requirements
 - Fee compression; cost pressures
 - Hiring skilled talent
 - Sustainable finance; challenge of data collection, disclosure regulation
- How will ManCo offerings continue to evolve and compete? Expanding into new services; Company Secretary and data management services

Participants

Antonio Giannino - Group Chief Risk & Compliance Officer, Amagis Capital

Peadar De Barra - Director & Chief Operating Officer, KB Associates

Rachel Hill - Director, Dragon Capital Markets

Ross Allen - Senior Investment Risk Manager, Jupiter Asset Management

Chair's summary

16:00 - 16:05

European Sustainable Investment Summit

Participants

Abbie Llewellyn-Waters - Fund Manager, Jupiter Asset Management

Chair's summary

16:00 - 16:05

UCITS & AIFMD London

Participants

Chair: Andrew Kehoe - Head of Legal, KB Associates

Networking break; connect in the virtual networking lounge

16:05 - 17:05

SCHEDULE

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12:00	12:20 - The hunt for authenticity: Effective and responsible marketing of ESG funds	12:20 - The cross-border distribution landscape in Europe; The road ahead
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14:00	14:20 - Evolving ESG commercial trends and investor demands	14:20 - Successfully launching funds in Europe; practical insight
15:00	15:10 - Managing climate-related financial risks and opportunities	15:10 - Evolving ManCo models; Challenges and opportunities in Europe
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Chair's welcome

09:25 - 09:30

European Sustainable Investment Summit

Participants

Abbie Llewellyn-Waters - Fund Manager, Jupiter Asset Management

Chair's opening remarks

09:25 - 09:30

UCITS & AIFMD London

Participants

Chair: Andrew Kehoe - Head of Legal, KB Associates

Passive vs Active approaches to ESG

09:30 - 10:20

European Sustainable Investment Summit

- Key differences between Passive vs Active approaches to ESG
- The rise of ESG ETFs; ETF ESG launches are increasing; signs of strong resilience, strong flows
- Challenges caused by index providers using different methodologies
- How active can you get with your passive ESG approach?
- Pros and cons of active vs passive ESG strategies

Participants

Mika Leskinen - Chief Investment Officer, FIM Asset Management

Andrzej Pioch, CFA - Fund Manager, LGIM

Fong Yee Chan - Director, EMEA Sustainable Investment Product, FTSE Russell

Matthieu Guignard - Global Head of Product Development and Capital Markets, Amundi ETF, Indexing & Smart Beta

Davis Catlin - Director of Stewardship, Senior Research Analyst, Sands Capital

Beyond Europe; Key developments in Asia and their global impact

09:30 - 10:20

UCITS & AIFMD London

- COVID-19 recovery; social and economic impact in APAC
- US-China trade war; where are we now, and how is the industry impacted?
- Key regulatory developments impacting distribution
 - Mutual recognition – where are we now?
 - China opening up; foreign ownership developments
- Developing market trends; investor demand and behaviours
 - How popular are UCITS in Asia today?
 - SRI has a significant market share; changing attitudes and demands
- Recent launches; success stories, challenges

Participants

Moderator: Li Yu, CFA, China Specialist

Yang Du - Former Managing Director, Head of Asset Management, China Securities International

Esther Law - Senior Investment Manager, Emerging Markets Debt, Amundi Asset Management

Shelley Yang, CFA - CEO and Founder, InvesTAO

Jaspal Sagger - Head of Global Product Strategy and Development, Franklin Templeton

The rise of impact investing

10:20 - 11:10

European Sustainable Investment Summit

- Impact examples; how is it working in practice?
 - Community investing, social impact bonds, green bonds
- Are we seeing enough positive real-world impact? Are enough companies walking the walk?
 - Measuring impact; comparing different criteria
- The challenges of making impact investing scalable
 - Does impact accrue to the balance sheet? To valuation
- Investment reporting solutions; effectively measuring performance

Participants

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

Daniela Barone Soares - CEO, Snowball Investment Management

Emanuele Fanelli - Senior Responsible Investment Manager, Aegon Asset Management

Jeremy Rogers - Chief Investment Officer, Big Society Capital

Andrea Marmolejo - Managing Partner, Blue Topaz Capital

Amy Clarke - Chief Impact Officer and Co-Founder, Tribe Impact Capital LLP

Getting up to speed with AML

10:20 - 11:00

UCITS & AIFMD London

- What impact has COVID-19 had on AML obligations?
 - FATF visits have been delayed, but preparations still need to be made. How should managers prepare?
- Divergences in market practice; different interpretations of regulation by different parties; where we stand now
- AML impact; educating investors
- 5th AML Directive; challenging requirements from transfer agencies

Participants

Daniel Capocci - Conducting Officer, NBS Asset Management

Mario Gabriel de Castro - Chief Compliance and Risk Officer, Alfa Asset Management (Europe) S.A.

Gerard Green - Head of EMEA AML, Invesco Asset Management S.A.

Salima Nanji - Independent Specialist, Legal, Compliance & Risk

Networking break; connect in the virtual networking lounge

11:10 - 11:40

Effective engagement strategies for long-term value creation

11:40 - 12:25

European Sustainable Investment Summit

- How ESG engagement influences investment performance
- Effectively engaging companies to influence ESG attitudes, policies and behaviours over the long term; addressing material ESG risks and opportunities
 - Developing engagement strategies specific to each company, sector, market
 - Identifying measurable objectives for engagement
 - Establishing valuable dialogue at the Board and Executive levels;
- Pros and cons of various voting models; centralisation vs outsourced services
 - Limitations of voting; share blocking, bureaucratic procedures, lost votes may influence outcomes
- Effectively monitoring and assessing engagement dialogue; practical insight
- What long term impacts has COVID-19 had on engagement best practice?

Participants

Marta Jankovic - Director, EMEA Head of Sustainable Investing for iShares, BlackRock

Silva Deželan - ESG Director, Stafford Capital Partners

Nina Roth - Director, Responsible Investment, BMO Global Asset Management

Jo Raven - Senior Manager, Engagements, FAIRR

Åse Bergstedt - Chief Sustainability Officer, International - Capital Improved

Challenges and Opportunities in Crypto, DLT/Blockchain and Digital Operational Resilience

11:40 - 12:30

UCITS & AIFMD London

- Crypto and Blockchain; Evolving challenges and opportunities in Europe
 - Growth and trends in different jurisdictions
- Latest regulatory developments
 - FCA ban; marketing and distribution of crypto-derivatives to retail investors; preparing for January 2021
 - European Commission's new regime to regulate the crypto-asset industry; EU Digital Finance Action Plan
- Opportunities and outlook

Participants

Stéphane Janin - Head of Global Regulatory Development, AXA Investment Managers

Jean-Charles Dudek - President, Napoleon Group

Norman Wooding - Founder & CEO, Script

Townsend Lansing - Head of Product, CoinShares

Jules Becci-Morin de la Rivière - Founder & CEO, Insula Investment Management

Networking break; connect in the virtual networking lounge

12:30 - 13:30

Spotlight on the 'S'; Social challenges and opportunities

13:30 - 14:20

European Sustainable Investment Summit

- How have COVID-19 and international social unrest in 2020 influenced the ESG agenda?
 - Significance of 'S' and 'G' key for long-term performance; labour conditions; income inequality; operational risks; resilience and business continuity
 - ESG risks in supply chains; Valuing and assessing the treatment of human capital in supply chains
- Future-proofing; optimizing and safeguarding human capital
 - Mitigating operational, regulatory and reputational risks

Participants

Cathrine De Coninck-Lopez - Global Head of ESG, Invesco

Thomas Schafbauer - Director, Arabesque

Kroum Sourov - SRI Sovereign Analyst, Candriam

Luke Barrs - Managing Director, Goldman Sachs Asset Management

ETF trading and resilience in the COVID-19 era

13:30 - 14:20

UCITS & AIFMD London

- How have European ETFs fared so far in 2020, against the backdrop of COVID-19?
 - New ETF launches demonstrating resilience
 - Investor interest in thematic ETFs
 - Equity and Fixed Income trading
- Challenges for ETFs in light of the coronavirus pandemic; Stress testing, liquidity impact
 - With borders closed and salespeople at home, how has the sales model changed - and is it gone forever?
 - How has the push to digital platforms worked during the lockdowns?
- How prepared is the industry for the next liquidity crisis?
- What do we believe this landscape will look like for ETFs in 2021?

Participants

Keshava Shastry - Managing Director, Asset Management, DWS

Axel Lomholt - Head of Product and Master Program Management, Vanguard, Asia

Jürgen Blumberg - Head of ETF Capital Markets, Goldman Sachs Asset Management

Vincent Denoiseux - Head of ETF Research and Solutions, Lyxor Asset Management

Gregoire Blanc - Head of Capital Markets & Liquidity, Amundi ETF, Indexing & Smart Beta

Improving culture for optimised performance

14:20 - 15:10

European Sustainable Investment Summit

- Impact of culture on financial performance, risk management, reputation, organisational sustainability and competitive advantage.
 - How should culture be measured?
- Strategies for improving culture
 - Diversity and inclusion; role of diversity in improving problem-solving and decision-making
 - Attracting diverse talent to the industry; What progress should be made over the next few years? How should it be achieved?

Participants

Bev Shah - CEO & Founder, City Hive

Sarah Maynard - Global Head, External Inclusion & Diversity Strategies, CFA Institute

Robert Alster - Chief Investment Officer, Close Brothers Asset Management

Dinésia Mendis - Ambassador, Diversity Project

Rosanna Burcheri - Portfolio Manager, Artemis Fund Managers

Michael Barrington-Hibbert - Founder and Global Managing Partner, Barrington Hibbert Associates

The strategic approach to regulatory fund disclosures: UCITS, PRIIPs and regulatory divergence

14:20 - 15:10
UCITS & AIFMD London

- Linking the value chain from data aggregation and enrichment through to document production and distribution
- Preparing for the UCITS KIID to PRIIPs KID transition
- Accounting for the complexity of UK/EU divergence

Participants

Ronan Brennan - Chief Product Officer, Compliance Solutions Strategies (CSS)

John Lee - President, Compliance Solutions Strategies (CSS)

David Walsh - Partner, Asset Management and Investment Funds, Dillon Eustace

Chair's summary and closing remarks

15:10 - 15:15
European Sustainable Investment Summit

Participants

Abbie Llewellyn-Waters - Fund Manager, Jupiter Asset Management

Chair's summary and closing remarks

15:10 - 15:15
UCITS & AIFMD London

Participants

Chair: Andrew Kehoe - Head of Legal, KB Associates

Networking break; connect in the virtual networking lounge

15:15 - 16:15

SCHEDULE

DAY 2 AGENDA: LIVE SESSIONS GMT TIME ZONE - 25/11/2020

European Sustainable Investment Summit

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11:00	11:10 - Networking break; connect in the virtual networking lounge 11:40 - Effective engagement strategies for long-term value creation	11:10 - Networking break; connect in the virtual networking lounge 11:40 - Challenges and Opportunities in Crypto, DLT/Blockchain and Digital Operational Resilience
12:00	12:30 - Networking break; connect in the virtual networking lounge	12:30 - Networking break; connect in the virtual networking lounge
13:00	13:30 - Spotlight on the 'S'; Social challenges and opportunities	13:30 - ETF trading and resilience in the COVID-19 era
14:00	14:20 - Improving culture for optimised performance	14:20 - The strategic approach to regulatory fund disclosures: UCITS, PRIIPs and regulatory divergence
15:00	15:10 - Chair's summary and closing remarks 15:15 - Networking break; connect in the virtual networking lounge	15:10 - Chair's summary and closing remarks 15:15 - Networking break; connect in the virtual networking lounge