

SESSIONS

FUNDFORUM INTERNATIONAL DAY ONE - 15/06/2021

FundForum International Virtual

14-16 June 2021

Virtual Event

Chair's welcome

10:25 - 10:30

2021 Economic outlook: Investing in a multipolar world - a new world order

10:30 - 11:00

FundForum International

How do leading fund buyers and asset managers see geopolitical tensions coupled with the COVID-19 pandemic shaping the business environment and attitudes towards investment this year?

Talking Heads: Incorporating diversity and inclusion into your strategy

11:00 - 11:20

FundForum International

Is the infrastructure of asset management fit for purpose post-COVID? How does the traditional asset management business model stack up in today's environment? How can we improve it?

11:20 - 11:50

FundForum International

Talking Heads: CEO Top tips for the rising stars aspiring to leadership positions

11:50 - 12:00

FundForum International

Is the current asset management industry equipped to adapt to the needs of the next-gen client?

12:00 - 12:30

FundForum International

Lunch and wellbeing break

12:30 - 13:40

Transformation of distribution by digitisation: The future of distribution happening right now

13:40 - 14:10

Distribution

Taking data driven approaches to marketing and sales distribution and exploring why roboadvisory hasn't disrupted the mutual fund distribution business as expected

Thriving in a digital-first world: What are the latest trends influencing investment operations and how are the top COOs supporting the business in this new normal?

13:40 - 14:10

Operations

The big picture and the ins and outs of trading in ETFs

13:40 - 14:10

ETFs & Passives

Understand the real liquidity of ETFs and trading best practice. Is there enough liquidity and market depth for the inflow of ETFs?

Pan-European private banking and the future of working with HNWLs

14:20 - 14:50

Distribution

How can asset managers better serve private banking clients in their hybrid approach to create flexible client journeys?

Digital transition and optimisation of front-to-back operations: Implementing innovative platforms to work with legacy architecture, meeting business and client needs

14:20 - 14:50

Operations

ESG ETFs from every angle

14:20 - 14:50

ETFs & Passives

How best to integrate ESG into an ETF structure. The impact of EU legislation on ETFs - SFDR, taxonomy and standardisation around ESG.

How UK wealth advisors are reconsidering their core business

15:00 - 15:30

Distribution

With the move to model portfolios and changes in remuneration models, what does that mean and what is the impact on these networks? What does this mean for their fund selection process?

Taking efficiency improvements to the next level: The drive towards outsourcing

15:00 - 15:30

Operations

How has the past year impacted the desire to outsource? How do you strike a balance between in-house operations and outsourcing to optimise workflows, mitigate risk and keep costs down?

Thematic ETFs: Fail to create value?

15:00 - 15:30

ETFs & Passives

Should investors be wary about the stellar returns posted by thematic ETFs? How do issuers and index providers identify the right themes that won't become a fad and help investors with due diligence?

Digitisation in portfolio management and client engagement: How is technology changing the way we service clients?

15:40 - 16:10

Distribution

DLT: Beyond blockchain

15:40 - 16:10

Operations

Talking bonds: Product development, demand, liquidity, and price discovery

15:40 - 16:10

ETFs & Passives

Understanding different fixed income indices: how are indices created and what are the methodologies? Does the growth of ETF affect underlying market volatility? What are the different approaches to ESG and their pros and cons?

Chair's closing remarks and close of day

16:10 - 16:15

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14:00	14:20 - Pan-European private banking and the future of working with HNWIs	14:20 - ESG ETFs from every angle		14:20 - Digital transition and optimisation of front-to-back operations: Implementing innovative platforms to work with legacy architecture, meeting business and client needs

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16:00	<p>16:10 - Chair's closing remarks and close of day</p>	<p>16:10 - Chair's closing remarks and close of day</p>	<p>16:10 - Chair's closing remarks and close of day</p>	<p>16:10 - Chair's closing remarks and close of day</p>

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FUNDFORUM INTERNATIONAL DAY TWO - 16/06/2021

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Chair's welcome

08:55 - 09:00

Fund flows - Where's the smart money going?

09:00 - 09:20

FundForum International

Talking Heads: CIO Top tips for the rising stars aspiring to leadership positions

09:20 - 09:30

FundForum International

CIO panel: Product innovation and income generation in the current low interest rate and volatile environment

09:30 - 10:00

FundForum International

Offering additional value to customers and evolving mandates in this low interest rate environment. What does the fixed income market look like? Is the push to credit sustainable?

Creating high performing investment teams and a collective sense of purpose in a digital world

10:00 - 10:10

FundForum International

Thematic solutions from biodiversity to biotechnology: Tapping into disruptive investment themes shaping today's world

10:10 - 10:40

FundForum International

Positioning portfolios to capture the benefits of disruption and create more data driven portfolios using both AI and human intelligence

Talking Heads: Pitch perfect – The art of the virtual pitch

10:40 - 10:50

FundForum International

FundForum's Wheel of Fortune

10:50 - 11:20

FundForum International

An interactive panel, where our top industry leaders spin the wheel to answer questions across a range of topics and asset classes.

The rise of alternatives: How will the blurring of lines impact traditional asset management?

10:50 - 11:20

Alternatives & Private Markets

Emerging & frontier markets: Is it still right to allocate to emerging markets?

11:30 - 12:00

FundForum International

Find out how leading institutional and retail investors are thinking about China and other emerging markets in the context of their portfolios

Alternative markets outlook in choppy waters

11:30 - 12:00

Alternatives & Private Markets

Macro updates, demands and megatrends: what can we expect from Europe's alternative markets ahead of 2021? Economic shifts and key trends that could impact the industry and asset allocations.

Roundtables: Shaping the future of asset and wealth management

12:10 - 12:40

FundForum International

- Alts for retail investors
- Portfolio construction: objective, liquidity, income
- ESG due diligence and reporting for asset manager and fund buyers

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- Alts for retail investors
- Portfolio construction: objective, liquidity, income
- ESG due diligence and reporting for asset manager and fund buyers

Lunch and wellbeing break

12:40 - 13:50

Chair's opening remarks

13:50 - 14:00

Distribution

Chair's opening remarks

13:50 - 14:00

Operations

The digital transformation imperative: The urgent need provoked by the pandemic crisis

13:50 - 14:20

Alternatives & Private Markets

Product development, efficiency improvements and client engagement in the new era and in the future

Fund selection 2021: New approaches to external manager selection post-COVID

14:00 - 14:30

Distribution

Fund buyers share insight into how managers can make the hitlist and create more efficient relationships with investors

Moving from a tactical to strategic approach to regulatory compliance: How to develop the best in your people, process and technology

14:00 - 14:30

Operations

In the hunt of yield: where are the opportunities in PE?

14:30 - 15:00

Alternatives & Private Markets

With record high dry powder and valuation, how do you invest sensibly? What should investors expect in terms of returns given the low interest rate environment? How attractive is PE?

Part one: Regulatory outlook briefings: The changing regulatory dynamic and impact on investment management

14:40 - 15:10

Distribution

1. From UCITS to PRIIPS (10 min):

Similarities and key differences between PRIIPs KIDs and UCITS KIIDs

2. AIFMD (10 min)

3. Capital Markets Union (10 min)

Democratisation of private markets: Exploring technological robustness and outsourcing solutions for the middle office

14:40 - 15:10

Operations

What tools will we need to help make alternatives available to a broader set of clients?

Cracking Crypto: an opportunity that investors can no longer ignore

15:10 - 15:40

Alternatives & Private Markets

Getting beneath the bitcoin hype, the best way to dabble in cryptocurrency, and where institutional investors' appetite is heading.

Part two: Panel discussion

15:20 - 15:50

Distribution

The changing regulatory dynamic and impact on investment management

Taking a holistic view of your data: Implementing an end-to-end data management strategy to increase transparency and enable informed decision-making

15:20 - 15:50

Operations

Outlook for hedge funds in the post-COVID world

15:50 - 16:20

Alternatives & Private Markets

A trade-off between liquidity and performance: how to diversify your portfolio using hedge funds? How have winning hedge fund managers reacted to market uncertainties and thrived during the pandemic and beyond? Why haven't liquid alts done better?

Sub-advisory part 1: Trailblazer interview: How a global financial institution is rethinking sub-advisory and strategic partnerships with managers

16:00 - 16:30

Distribution

How managers get on the hitlist and become relevant partners for the mandates business

Managing cyber risks and staying secure in uncharted territory: Cyber compliance and culture, data privacy

16:00 - 16:30

Operations

Adapting to your clients' needs and improving your own technology and processes in the new normal

High on the agenda – Sustainability in private markets and the challenges of ESG implementation

16:30 - 17:00

Alternatives & Private Markets

How is global regulation shaping sustainable business practices and what is the impact on investments? How do you measure sustainability in private markets and what direct actions are fund managers taking? Can ESG be truly integrated across different asset classes?

Sub-advisory part 2: The developments of pan-European sub-advisory partnership models in private banking

16:40 - 17:10

Distribution

Custody in the era of high technology: What have been the expected and unexpected consequences on the distribution model?

16:40 - 17:10

Operations

Chair's closing remarks and close of day

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