

Registration and Welcome Coffee

07:45 - 08:20

Chair's Welcome

08:20 - 08:30

IMIPOWER Leaders

Participants

Presenter: Richard Garland - Managing Director, Global Advisor, Ninety One

Where are new opportunities for asset management to help needs of the wider economy and society? How do we enable industry growth and help build long term economic security for millions of savers worldwide?

08:30 - 09:00

IMIPOWER Leaders

Participants

Moderator: Justin Onuekwusi - Fund Manager, Head of Retail Multi Asset Funds, Legal & General Investment Management

Speaker: Hendrik du Toit - Chief Executive Officer, Ninety One

Speaker: Ivan Pascual Ferrer - Managing Director, Head of EMEA iShares & Wealth, Blackrock

Speaker: Leonique van Houwelingen - CEO, BNY Mellon Securities Services

Modernising the financial system - How asset management businesses need to respond to technology innovations in platforms, open finance and AI that are transforming retail and workplace investment

09:00 - 09:30

IMIPOWER Leaders

Modernising the financial system.

Participants

Moderator: Joe Saliba - Deputy Chief Executive Officer, CACEIS

speaker: Paul Goodwin - Proposition and Growth Leader, DC and Individual Wealth, MERCER MONEY / MERCER HEALTH

Speaker: Enrique Sacau - Chief Executive Officer, KNEIP

speaker: Samantha Seaton - CEO, MoneyHub

Speaker: Stephane Corsaletti - Chief Investment Officer, Allfunds

speaker: Martin Gilbert - Chairman, Revolut

IMIPOWER Leaders in association with Alts Invest: Private Markets for Retail Markets: Overcoming the challenges and taking advantage of the opportunities

09:30 - 10:00

IMIPOWER Leaders

Participants

Moderator: Richard Bruyere - Managing Partner, INDEFI

Speaker: Olivier Carcy - Head of Asset Management, Indosuez Wealth Management

Speaker: Bruno Guiot - Group Head of Unit Linked Investment, Zurich Insurance Company

Speaker: Frederik Meheus - Managing Director, Moonfare

Speaker: Alexandra Daly - Founder and CEO, Chair of the Council for Investing in Female Entrepreneurs, AA Advisors

Speaker: Paolo Biamino - Alternative Global Investments, Euromobiliare Asset Management

Leaders Interview

10:00 - 10:10

IMIPOWER Leaders

Participants

Speaker: Sandro Pierri - CEO, BNP Paribas Asset Management

Speaker: Richard Bruyere - Managing Partner, INDEFI

Morning coffee break

10:10 - 11:00

Chairperson welcome

11:00 - 11:05

FundForum International

Participants

Presenter: Richard Garland - Managing Director, Global Advisor, Ninety One

Chairperson welcome

11:00 - 11:05

Inside ETFs Europe

Chairperson welcome

11:00 - 11:05

Sustainability & Impact Investor Forum

Global distribution - What are the latest macro trends that you need to plan for the next five years?

11:05 - 11:30

FundForum International

Participants

Moderator: Henning Swabey - Head of Europe, Calastone

Speaker: Joseph Pinto - COO, Natixis Investment Managers

Speaker: Alexandra Altinger - CEO, UK, Europe, Asia, JO Hambro Capital Management

speaker: Jörg Ambrosius - CEO Europe, Middle East & Africa, State Street

speaker: Furio Pietribiasi - Managing Director, Mediolanum Asset Management Ltd

Tapping into retail: transparency, liquidity and ETF adoption

11:05 - 11:30

Inside ETFs Europe

In the fragmented European ETF market, how can investors understand the true spread and liquidity? What are the best practices for trading ETFs? How are market makers making ETFs more accessible for retail intermediaries? What are index providers doing to improve ETF transparency? How to manage liquidity in funds with exposure to small- and micro-caps?

Participants

Speaker: Jürgen Blumberg - Head, ETF Product & Capital Markets EMEA, Goldman Sachs Asset Management

Speaker: Ernst Knacke - Head of Research, LeifBridge

Speaker: Chris-Oliver Schickentanz - Chief Investment Officer, Commerzbank

Leaders of ESG: data insights into opportunities and future challenges in sustainable investing that will deliver both the returns and impact that investors demand

11:05 - 11:30

Sustainability & Impact Investor Forum

Participants

Panellist: Alastair Wainwright - Senior Consultant, Global Research, ISS Market Intelligence (ISS MI)

Speaker: Andrew Summers - Head of Collectives & Fund Research, Investec Wealth Management

speaker: Peter Branner - CIO, APG Asset Management

speaker: Ulf Erlandsson - Founder, CEO, Anthropocene Fixed Income Institute

speaker: George Latham - CEO, WHEB Asset Management

How SFDR and Euro Taxonomy are bringing sustainable investment into mainstream distribution. What are the implications of this step change for all asset managers, investors and service providers?

11:30 - 12:00
FundForum International

Participants

Moderator: Jauri Hakka - Member of the Board, APFI, Chairman of the Board, SFR Scandinavian Financial Research Ltd

Speaker: Pierre-Adrien Doman - Chief Executive Officer, Fund Channel

Speaker: Guendalina Bolis - CEO and Chairman of the Board, Inversis Gestion

Speaker: Lorenzo Gazzoletti - CEO, Montpensier Finance

Speaker: Pat Sharman - Country Managing Director, UK, CACEIS

Speaker: Claire Hedley - EMEA ESG and Sustainable Investing Strategist, Goldman Sachs Asset Management

Thematic ETFs and indexing

11:30 - 12:00
Inside ETFs Europe

- Finding funds that capture new, long-lasting themes

- Fee profile of thematic ETFs vs non-thematic ETFs

- Differentiating the good thematic indices from the bad

- the latest innovations in thematic indexing

Participants

Speaker: Monika Dutt - Director, Head of EMEA Passive Strategies Research, Morningstar

Speaker: Victor Hugo Gómez - CEO, BITA

Speaker: Martijn Rozemuller - CEO, VanEck Europe

Speaker: Jonas Thulin - Head of Asset Management, Erik Penser Bank

Speaker: Rahul Bhushan - Co-Founder, RIZE ETF

Innovations in Sustainable Investment and crypto: Portfolio and custody opportunities and challenges

11:30 - 12:00
Sustainability & Impact Investor Forum

Participants

Presenter: Kai Upadek - Partner, Oliver Wyman

Private banks and the new portfolio – the rise of thematic, alternatives and other super trends. How CIOs are telling a distinctive new story

12:00 - 12:30
FundForum International

Participants

Panellist: Stéphane Monier - Chief Investment Officer, Banque Lombard Odier & Cie

Speaker: Lars Kalbreier - Global CIO Private Banking, Edmond de Rothschild (Suisse) S.A.

speaker: Dan Scott - Chief Investment Officer, Wealth Management, Vontobel

speaker: Veronique Morel - Senior Wealth Manager, Raymond James Wealth Management

Finding a competitive edge for new entrants: how to successfully launch a European ETF?

12:00 - 12:30
Inside ETFs Europe

The essential road map for launching a successful ETF in Europe. Our industry experts will share their insight into the European market, regulatory aspects and how to create a winning distribution strategy.

Participants

Speaker: Deborah Fuhr - Managing Partner & Co-Founder, ETFGI

Speaker: Gareth Myburgh - Director, EMEA ETF Product Manager, Citi

Innovations in ESG and sustainability: A showcase of new solutions and asset classes from carbon solutions, to energy hedge funds and long short impact

12:00 - 12:30
Sustainability & Impact Investor Forum

Carbon solutions as an asset class

Participants

Presenter: Alex Child MSc - Carbon Markets Research Manager, Carbon Cap

Presenter: Suzanne Jenkins - Head of Distribution, Westbeck Capital Management

Presenter: Antti Savilaakso - Researcher & partner for global equity market neutral long/short fund based on sustainability and ESG., Impact Cubed

Lunch & Networking

12:30 - 14:00

Chair's Afternoon Opening

14:00 - 14:05
Distribution Summit

Participants

Presenter: Richard Garland - Managing Director, Global Advisor, Ninety One

The Future of Operations: How are leaders driving change in the face of increased competition from implementing transformative technology to attracting and retaining top talent?

14:00 - 14:30
Innovation and Operations Forum

Participants

Moderator: Pervaiz Panjwani - Managing Director, Custody and Fund Services Head – EMEA, Citi

Speaker: Davina Goodall-Smith - Chief Operating Officer, EMEA, Nikko Asset Management

Speaker: Chris Wiksyk - Chief Executive Officer, Director, RBC Global Asset Management (UK)

How leading fund selectors are shifting their allocations preferences in sustainable, impact and thematic funds - what, where, who, why?

14:00 - 14:30
Sustainability & Impact Investor Forum

How investment in sustainable solutions is changing in the most advanced private wealth markets across equity, bonds and real assets - Special focus Nordic.

Participants

Moderator: Niklas Tell - Chief Content Officer, Tell Media Group

Speaker: Susanne Bolin Gartner - Head of Manager and Fund Selection, Danske Bank

Speaker: Mussie Kidane - Head of Fund and Manager Research, Pictet

Speaker: Mikael Haglund - Head of Manager Research, SEB WEALTH

speaker: Mia Soederberg - Asset Manager Selection, Munich Re

speaker: James Bevan - CIO, CCLA

The ESG debate: going beyond traditional ETF indices

14:00 - 14:30

Inside ETFs Europe

Evaluating the differences between various ESG approaches in the passive space. How do investors identify sound sustainability goals? How can index managers be more proactive when comes to ESG ETFs?

Participants

Moderator: Monika Dutt - Director, Head of EMEA Passive Strategies Research, Morningstar

Speaker: Mark Perchtold CFA CA(SA) - Co-Founder, Omba Advisory & Investments Ltd

Speaker: Peter Branner - CIO, APG Asset Management

The cross-border distribution landscape - the road ahead

14:05 - 14:30

Distribution Summit

How has the game changed? Where does digitalisation and client interaction go from here? Which platforms/distributors are doing well and why across the UK and the rest of Europe?

Participants

Moderator: Bella Caridade-Ferreira - CEO, Fundscape

Speaker: Kimberly LaPointe - Head of PGIM Investments International, PGIM

Speaker: Justin Onuekwusi - Fund Manager, Head of Retail Multi Asset Funds, Legal & General Investment Management

Speaker: Julian Ide - Head of EMEA Distribution, Franklin Templeton

Speaker: Alexandre Pini - Director, Member of the Management Committee, Carnegie Fund Services

Sub advisory strategy reset 2.0 – The scale game: Emergence of the sub-advised fund / solutions platforms which is a game changer

14:30 - 15:00

Distribution Summit

These platforms have great potential to gather scale very quickly by Banks and other distributors outsourcing the operation of their sub-advisory offering to these solution platform providers. Why would they? What are the benefits and drawbacks? Can the platform model work? What does it mean for third party asset managers as sub-advisers, having so far preferred distributing their own fund versions? How do you deploy your strategic resources to dominate distribution for scale?

Participants

Moderator: Andreas Pfunder - Founder and CEO, instiHub Analytics

Panellist: François-Xavier Gennetais - Chairman and Chief Executive Officer, ABN Amro Investment Solutions

Panellist: Stephane Corsaletti - Chief Investment Officer, Allfunds

Panellist: Mike Reed - Head of Strategic Partnerships, BlueBay Asset Management

Panellist: Francois Régis Bocqueraz - Head of Sub-Advisory & Fund Hosting, Amundi Asset Management

Panellist: Olivier Paccalin - Head of Wealth Management Solutions, SG Private Banking

Harnessing the power of data: Transforming distribution and client operations through data analytics

14:30 - 15:00

Innovation and Operations Forum

Participants

Speaker: Gert Rautenberg - CCO, ACOLIN

Speaker: Terry Yokaiden - Head of Distribution, Business Support & Governance, First Sentier Investors

Speaker: Gary Paulin - Head of Global Strategic Solutions, Northern Trust

What investing For Net Zero looks like in developed and emerging markets? Leading asset managers and investors speak out

14:30 - 15:00

Sustainability & Impact Investor Forum

Participants

Moderator: Justina Deveikyte - Managing Director, Cerulli Associates (Europe)

Speaker: David Zahn - Head of European Fixed Income, Franklin Templeton

Speaker: Rodolphe Bocquet - Global Head of Sustainable Investment, Qontigo

Speaker: Rasmus Bessing - Executive Director, COO, PFA Pension, Denmark

Speaker: Yvette Babb - Fixed Income Portfolio Manager, William Blair International

Speaker: Neil Brown - Head of Equities, Gulf International Bank GIBAM

Bond ETFs

14:30 - 15:00

Inside ETFs Europe

Why is it so difficult for new issuers to launch Fixed Income ETFs? How do investors invest in ESG, smart beta and thematic in bond ETFs? Do factors work in fixed income ETFs? Our fixed income experts will also discuss the liquidity and trading in bond ETFs and what happens in periods of market stress and volatility.

Participants

Speaker: Pasquale Capasso - Head of Southern Europe & LatAm ETF Capital Markets, Invesco

Speaker: Ernst Knacke - Head of Research, LeifBridge

Speaker: Nick Wood - Head of Investment Fund Research, Quilter Cheviot

Fast track global distribution – comparing how top firms build global presence and the increasing role of new insights and data analytics

15:00 - 15:30

Distribution Summit

Participants

Speaker: Pascal Duval - Deputy head Solutions & Services, Amundi

Speaker: Juan Luis Rivera - Senior Partner and USA CEO, Moneda Asset Management

Creating a cost-efficient transformation road map to better service clients

15:00 - 15:30

Innovation and Operations Forum

Participants

Speaker: Alain Mandy - Chief Transformation Officer, Wellington Management

Speaker: Nadine Teychenne - Director of Custody Product Development, Digital Assets and DLT Securities Services, Citi

Speaker: Kate Webber - Global Head of Funds Product, Northern Trust Security Services

Buyers ESG Solutions Case studies in shifting from integration to solution-based approaches to ESG that deliver returns and impact

15:00 - 15:30

Sustainability & Impact Investor Forum

Participants

Presenter: Eugenia Jackson - Head of ESG Research, Fixed Income, PGIM

Presenter: Adrian Daniel - Lead Portfolio Manager, Mainfirst Absolute Return Multi Asset fund

Presenter: Alex Bebov - Managing Director, Balkan Advisory Company

Active ETFs: is new breed the best breed?

15:00 - 15:30

Inside ETFs Europe

Using ETF wrappers for active investments vs regular mutual funds: what are the, structural disadvantages and benefits of each for investors? Are active ETFs climbing up the leader board?

Participants

Speaker: Alberto Herranz - Investment Research; Risk Analysis, Allfunds Bank

Speaker: Weixu Yan - Investment Director and Head of ETF Research, Close Brothers Asset Management

Afternoon Break

15:30 - 16:30

Navigating outsourcing: Top CIOs, fund selectors and operational leaders speak out about the pros and cons of outsourcing in 2022 and beyond

16:30 - 17:00

Distribution Summit

Participants

Speaker: Neil Clare - Senior Analyst, FundQuest Advisor

Speaker: Gildas Le Treut - Head of Sales and Relationship Management, SSGS

Speaker: Nick Wood - Head of Investment Fund Research, Quilter Cheviot

Speaker: Olivier Raingeard de la Blétière - Chief Investment Officer- Banque Neufilze OBC & Global Head of Equity - ABN Amro Group, Banque Neufilze OBC

Sustainability leaders on SFDR as a tool for competitive edge

16:30 - 17:00

Sustainability & Impact Investor Forum

Participants

Moderator: Valentin Allard - Senior Consultant, Indefi

Speaker: Bruno Guiot - Group Head of Unit Linked Investment, Zurich Insurance Company

Speaker: Johann Rivalland - CEO, UBS La Maison de Gestion

Speaker: Christophe Girondel - Member of Executive Management & Global Head of Distribution, Nordea Asset Management

Best practice DC in Europe's main markets

17:00 - 17:30

Distribution Summit

Participants

moderator: Ric van Weelden - Senior Partner, INDEFI

Panellist: Arnaud Schwebel - Global Head of Pension Solutions, BNP Paribas Asset Management

Panellist: Sumit Mehta - Head of Investment Solutions, Legal & General

Panellist: Anders Schelde - CIO, Akademiker Pension

Panellist: Rémi Cuinat - Director of unit linked assets, Generali

Innovations in sustainable investment: the top brands in Responsible Investing and the value of quantifiable, measurable brand indices for multi-managers and investors

17:00 - 17:30

Sustainability & Impact Investor Forum

Participants

Moderator: Jean-Francois Hirschel - CEO, RIBI

Speaker: Rémi Lambert - Deputy Chief Executive Officer, Chief Investment Officer, Architas France

Speaker: Yves Ceelen - CIO Global Balanced, Member of the Management Board and Head of Institutional Mandates, DeGroof Petercam Asset Management

Speaker: Sébastien Gyger PhD, CFA - Head of Fund Selection, Rothschild & Cie

Speaker: Nicolas Moussavi - Head of Mutual Fund Selection, Société Générale Asset Management

How global financial institutions are rethinking sub-advisory and strategic partnerships with managers

17:30 - 18:00

Distribution Summit

Participants

Moderator: Christel Tarneaud - Senior Project Manager, Indefi

Panellist: Marcus Storr - Member of the Board, FERI Trust GmbH

Panellist: Markus Sgouridis - Head of Fund Solutions, Julius Baer

Panellist: Fanny Nosetti - Head of Multimanagerment, Banque de Luxembourg Investments (BLI)

Panellist: Lucien Carton - Head of AMSelect, BNP Paribas Asset Management

Best new ideas in alternatives, real assets and infrastructure for private wealth: Uncorrelated investing aligned to sustainable goals

17:30 - 18:00

Sustainability & Impact Investor Forum

Participants

moderator: André Havas - CEO and Partner, CIMalgo AB

Speaker: Marc Syz - CEO, Syz Capital

Speaker: Giovanni D'Alesio - Head of Research – Alternative Investment Solutions, GAM Investments

Speaker: Leah Cox - Co-Founder, Managing Director, IANUA Market

Speaker: Rod Chisholm - Partner, ATLAS Infrastructure

IMI|Power Drinks Reception

18:00 - 19:00

SCHEDULE

IMIPOWER DAY 1 - 20/10/2021

FundForum International

20-22 October 2021

The Grimaldi Forum
Monaco

TIME	DISTRIBUTION SUMMIT	FUNDFORUM INTERNATIONAL	IMIPOWER LEADERS	INNOVATION AND OPERATIONS FORUM	INSIDE ETFS EUROPE	SUSTAINABILITY & IMPACT INVESTOR FORUM
07:00	07:45 - Registration and Welcome Coffee	07:45 - Registration and Welcome Coffee	07:45 - Registration and Welcome Coffee	07:45 - Registration and Welcome Coffee	07:45 - Registration and Welcome Coffee	07:45 - Registration and Welcome Coffee
08:00			08:20 - Chair's Welcome 08:30 - Where are new opportunities for asset management to help needs of the wider economy and society? How do we enable industry growth and help build long term economic security for millions of savers world- wide?			
09:00			09:00 - Modernising the financial system - How asset management businesses need to respond to technology innovations in platforms, open finance and AI that are transforming retail and workplace investment 09:30 - IM Power Leaders in association with Alts Invest: Private Markets for Retail Markets: Overcoming the challenges and taking advantage of the opportunities			
10:00	10:10 - Morning coffee break	10:10 - Morning coffee break	10:00 - Leaders Interview 10:10 - Morning coffee break	10:10 - Morning coffee break	10:10 - Morning coffee break	10:10 - Morning coffee break

SCHEDULE

IMIPOWER DAY 1 - 20/10/2021

FundForum International

20-22 October 2021
The Grimaldi Forum
Monaco

TIME	DISTRIBUTION SUMMIT	FUNDFORUM INTERNATIONAL	IMIPOWER LEADERS	INNOVATION AND OPERATIONS FORUM	INSIDE ETFS EUROPE	SUSTAINABILITY & IMPACT INVESTOR FORUM
11:00		<p>11:00 - Chairperson welcome</p> <p>11:05 - Global distribution - What are the latest macro trends that you need to plan for the next five years?</p> <p>11:30 - How SFDR and Euro Taxonomy are bringing sustainable investment into mainstream distribution. What are the implications of this step change for all asset managers, investors and service providers?</p>			<p>11:00 - Chairperson welcome</p> <p>11:05 - Tapping into retail: transparency, liquidity and ETF adoption</p> <p>11:30 - Thematic ETFs and indexing</p>	<p>11:00 - Chairperson welcome</p> <p>11:05 - Leaders of ESG: data insights into opportunities and future challenges in sustainable investing that will deliver both the returns and impact that investors demand</p> <p>11:30 - Innovations in Sustainable Investment and crypto: Portfolio and custody opportunities and challenges</p>
12:00	12:30 - Lunch & Networking	<p>12:00 - Private banks and the new portfolio – the rise of the-matics, alternatives and other super trends. How CIOs are telling a distinctive new story</p> <p>12:30 - Lunch & Networking</p>	12:30 - Lunch & Networking	12:30 - Lunch & Networking	<p>12:00 - Finding a competitive edge for new entrants: how to successfully launch a European ETF?</p> <p>12:30 - Lunch & Networking</p>	<p>12:00 - Innovations in ESG and sustainability: A showcase of new solutions and asset classes from carbon solutions, to energy hedge funds and long short impact</p> <p>12:30 - Lunch & Networking</p>
13:00						

SCHEDULE

IMIPOWER DAY 1 - 20/10/2021

FundForum International

20-22 October 2021

The Grimaldi Forum
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TIME	DISTRIBUTION SUMMIT	FUNDFORUM INTERNATIONAL	IMIPOWER LEADERS	INNOVATION AND OPERATIONS FORUM	INSIDE ETFS EUROPE	SUSTAINABILITY & IMPACT INVESTOR FORUM
14:00	<p>14:00 - Chair's Afternoon Opening</p> <p>14:05 - The cross-border distribution landscape - the road ahead</p> <p>14:30 - Sub advisory strategy reset 2.0 – The scale game: Emergence of the sub-advised fund / solutions platforms which is a game changer</p>			<p>14:00 - The Future of Operations: How are leaders are driving change in the face of increased competition from implementing transformative technology to attracting and retaining top talent?</p> <p>14:30 - Harnessing the power of data: Transforming distribution and client operations through data analytics</p>	<p>14:00 - The ESG debate: going beyond traditional ETF indices</p> <p>14:30 - Bond ETFs</p>	<p>14:00 - How leading fund selectors are shifting their allocations preferences in sustainable, impact and thematic funds - what, where, who, why?</p> <p>14:30 - What investing For Net Zero looks like in developed and emerging markets? Leading asset managers and investors speak out</p>
15:00	<p>15:00 - Fast track global distribution – comparing how top firms build global presence and the increasing role of new insights and data analytics</p> <p>15:30 - Afternoon Break</p>	15:30 - Afternoon Break	15:30 - Afternoon Break	<p>15:00 - Creating a cost-efficient transformation road map to better service clients</p> <p>15:30 - Afternoon Break</p>	<p>15:00 - Active ETFs: is new breed the best breed?</p> <p>15:30 - Afternoon Break</p>	<p>15:00 - Buyers ESG Solutions Case studies in shifting from integration to solution-based approaches to ESG that deliver returns and impact</p> <p>15:30 - Afternoon Break</p>
16:00	<p>16:30 - Navigating outsourcing: Top CIOs, fund selectors and operational leaders speak out about the pros and cons of outsourcing in 2022 and beyond</p>					<p>16:30 - Sustainability leaders on SFDR as a tool for competitive edge</p>

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FundForum International

20-22 October 2021

The Grimaldi Forum

Monaco

TIME	DISTRIBUTION SUMMIT	FUNDFORUM INTERNATIONAL	IMIPOWER LEADERS	INNOVATION AND OPERATIONS FORUM	INSIDE ETFS EUROPE	SUSTAINABILITY & IMPACT INVESTOR FORUM
17:00	<p>17:00 - Best practice DC in Europe's main markets</p> <p>17:30 - How global financial institutions are rethinking sub-advisory and strategic partnerships with managers</p>					<p>17:00 - Innovations in sustainable investment: the top brands in Responsible Investing and the value of quantifiable, measurable brand indices for multi-managers and investors</p> <p>17:30 - Best new ideas in alternatives, real assets and infrastructure for private wealth: Uncorrelated investing aligned to sustainable goals</p>
18:00	18:00 - IMIPower Drinks Reception	18:00 - IMIPower Drinks Reception	18:00 - IMIPower Drinks Reception	18:00 - IMIPower Drinks Reception	18:00 - IMIPower Drinks Reception	18:00 - IMIPower Drinks Reception

Registration and Welcome Coffee

07:15 - 07:45

How To Be a Better Allocator in the post-Covid World presented by APFI

07:45 - 08:45

Breakfast Briefing: How to be a better allocator in the post-COVID world

Participants

Speaker: Adam Choppin - Assistant Portfolio Manager at Xponance & Chairman of the Board, Association of Professional Fund Investors (APFI)

Speaker: Mussie Kidane - Head of Fund and Manager Research, Pictet

Speaker: Gandy Gandizanza - Chief Strategy Officer, FundCraft

IMIPOWER Chair's Welcome and Keynote Introduction

08:45 - 08:50

IMIPOWER Leaders

Participants

Speaker: Sanjiv Sawhney - Managing Director, Global Head of Custody and Fund Services, Citi

Geopolitical Keynote: The next big market shock - climate

08:50 - 09:20

IMIPOWER Leaders

Keynote Rana Farooohar

Rana Aylin Farooohar is an American business columnist and an associate editor at the Financial Times. She is also CNN's global economic analyst.

With asset values at record levels, public and private debt as high as it's ever been, and massive pandemic related fiscal stimulus having been poured over 4 decades of easy monetary policy, many investors are wondering when we will see the next big market shock. Will it be the bursting of the corporate debt bubble? Will it be a correction in the dollar? Or the fall out from a trade war or a new COVID variant?

I'd argue no -- the next shock will be about climate change. And indeed, it's already here.

Until recently, reinsurers and banks have borne most of the market risk -- and in some cases reward -- from dealing with climate change. Now, things are changing. Individual companies are seeing real share price impact from everything from how they deal with their carbon footprints across supply chains, to how much waterfront property they own or are exposed to, or whether they use raw materials from areas particularly exposed to climate risk (see my recent column on metrics and share price impact here:

<https://www.ft.com/content/f02537ef-0cbd-4566-8f0c-a1dfe798f54a>)

Regulators are catching up too (China putting a price on carbon, the EU tabling a new carbon price proposal in July, and ESG reporting rules coming from the SEC). I will lay out the sticking points and the low hanging fruit politically, and talk about what we should watch for at COP26 from the US, France, Germany and others.

Bottom line -- how companies and governments deal with climate will change the financial markets (I'll get into how a price on carbon changes Chinese mercantilism and US/EU/China trade issues), global growth (a clean tech boom is the very best chance for a shared productivity boost that decreases inequality) and geopolitics (more local, regional, less unfettered globalism -- the topic of my next book!).

I'll weave stories of specific corporate challenges and opportunities throughout -- from the fall of fast fashion, to the rise of localized high tech agriculture, to the corporate and national players best poised to succeed in this new world.

Participants

Panellist: Rana Aylin Farooohar - Global Business Columnist, Associate Editor, FINANCIAL TIMES & global economic analyst, CNN

As global power-blocs re-align what are the new implications opportunities and threats for investment?

09:20 - 09:55

IMIPOWER Leaders

From rising social inequality, democracies under fire and the good intentions on sustainability who is really winning the geo-political war-game?

Participants

Moderator: Rana Aylin Farooohar - Global Business Columnist, Associate Editor, FINANCIAL TIMES & global economic analyst, CNN

Speaker: John D. Campbell OBE - Chairman of the Advisory Board, Carnegie Fund Services

Speaker: Zehrid Osmani - head of the Global Long-Term Unconstrained Team, Martin Currie

Speaker: Sherry Madera - Chief Industry and Government Affairs Officer, London Stock Exchange Group

speaker: David Semaya - Executive Chairman of The Board, Representative Director, Sumitomo Mitsui Trust Asset Management

speaker: Hans Stoter - Chief Investment Officer, Axa Investment Managers

Ambitions for COP 26 - Progress on the greening of the financial system towards carbon pricing, global co-operation and regulation.

09:55 - 10:05

IMIPOWER Leaders

Redefining the crucial role of asset management in the greening and modernisation of the financial system from carbon solutions to impact investing: What are going to be the sustainable finance solutions of the future that institutional and retail investors will want to buy that can demonstrate that they do what they say?

10:05 - 10:40

IMIPOWER Leaders

Is the focus on improving ESG data and standards genuine progress or a dangerous smokescreen that sidelines meaningful regulation?

Participants

Moderator: Cameron Brandt - Director of Research, EPFR Global

Speaker: Steve Waygood - Chief Responsible Investment Officer, Aviva Investors

Speaker: Michael Azlen CAIA - Founder & CEO, Carbon Cap

Speaker: Xavier Baraton - Global CIO, HSBC Asset Management

Speaker: Ann Prendergast - Head of Europe, State Street Global Advisors

speaker: Euan G Munro, FIA - CEO, Newton Investment Management

Morning Coffee

10:40 - 11:30

Distribution 2022 – has digital changed things forever? Top boutique asset managers and selectors speak out

11:30 - 12:00

Distribution Summit

Participants

Moderator: Philip Kalus - Managing Partner, Accelerando Associates

Speaker: Christian Leger - MD, Head of CH and Head of European Bank, Allianz Global Investors

Speaker: Petter von Bonsdorff - MD, Head of International Business Development, Evli

Speaker: William de Gale FCA CFA - Partner and Fund Manager, BlueBox Wealth Management

Speaker: Nicolas Moussavi - Head of Mutual Fund Selection, Société Générale Asset Management

Leaders of institutional investing - Positioning for the next big thing... Changing long-term pension and insurance investment strategies and partnering for positive change. What is the impact on portfolio management?

11:30 - 12:00

FundForum Investment

How pension investors are coping with fast aging demographics in an era of zero bound rates

Participants

Moderator: Dr Oliver Roll - Founder, 4ALPHADRIVERS

Speaker: Olivier Rousseau - Executive Director, FRR The French Pension Reserve Fund

Speaker: Elena Manola-Bonthond - CIO, CERN Pension Fund

Speaker: Christof Kessler - CEO, Gothaer Asset Management

Speaker: Jean-Francois Garin - Deputy Group CEO, Groupama Group and CEO, Groupama Gran Vie

Opening keynote: The future of impact investing – Solutions for people and planet

11:30 - 12:00

Sustainability & Impact Investor Forum

Participants

Presenter: Deirdre Cooper - Co-Head of Thematic Equity, Ninety One

How to make a difference as a boutique: Building mid-size and boutique marketing and reputation

12:00 - 12:30

Distribution Summit

Brand as the great leveller - How to make a difference as a boutique

Perspectives from boutique managers and fund buyers

Participants

Moderator: Rob Sanders - Co-Founder, Door

Speaker: Paul Price - CEO & Founder, Haven Green

Speaker: Matthew Jones - Head of Distribution, Eurizon SLJ Capital

Speaker: Adrian Jackson - Director Client Services, Pzena Investment Management

speaker: Bernard Aybran - Head of Portfolio Management, Allfunds

Battle of the emerging markets

12:00 - 12:40

FundForum Investment

What are the risks and opportunities in emerging and frontier markets? Who will be the winners and the losers?

Participants

Moderator: Adam Choppin - Assistant Portfolio Manager at Xponance & Chairman of the Board, Association of Professional Fund Investors (APFI)

Speaker: William Landers - Managing Partner, Head of LatAm Equities, BTG Pactual Asset Management

Speaker: Patrick Daniels - Partner, Robbins Geller Rudman & Dowd LLP

Speaker: Luke Barrs - Head of Fundamental Equity Client Portfolio Management in EMEA and Asia Ex-Japan, Goldman Sachs Asset Management

Speaker: Angeles Toledo Rodriguez - Lead Fund Manager, Triodos Groenfondos

Speaker: Valeria Vine - Investment Director, Capital Group

Speaker: Praveen Jagwani - Chief Executive Officer, UTI International

Small but mighty – how boutiques are perfectly primed for delivering impact

12:00 - 12:30

Sustainability & Impact Investor Forum

Three boutiques discuss the trends behind their funds from sustainable thematic equities to listed impact and deforestation

1. Sustainable Thematic Equity: Paul Merle, Fund Manager of Sustainable Thematic Equities LFDE
2. Natural resources -Tanja Havemann, Director, Clarmondial AG
3. Listed Impact: Elena Tedesco, Portfolio Global Listed Impact Fund, Vontobel

Participants

Presenter: Paul Merle - Fund Manager of Sustainable Thematic Equities, La Financière de l'Echiquier (LFDE)

presenter: Elena Tedesco - Portfolio Manager, Positive Impact Fund, Vontobel

Presenter: Tanja Havemann - Founder, Clarmondial

Fund Administration A futuristic session focussing on the future of fund management and fund administration. New technology positive energetic thought- provoking interactive discussion

12:30 - 13:10

Distribution Summit

Refocusing on the 'S' & the 'G' in impact investing for private wealth

12:30 - 13:10

Sustainability & Impact Investor Forum

Climate commitments and environmental impact dominate the conversation, but there is a wealth of opportunity in social impact funds for private wealth and family offices.

Participants

Moderator: Kai Upadek - Partner, Oliver Wyman

Speaker: Karin Bouwmeester - Sustainability Manager, ABN AMRO Private Bank

Speaker: Hans Van Houwelingen - Founder & Managing Director, Urban Impact Ventures

Speaker: Phoebe Stone - Partner & Head of Sustainable Investing, LGT Vestra

speaker: Benjamine Friderich - Investment Director, ENOWE Family Office

speaker: Eren Kelekci - Chief Investment Officer - Private Sector Food & Agriculture, Textile and Forestry, African Development Bank

The new business of boutiques: Different partnership business models for scale and distribution

12:40 - 13:10

FundForum Investment

Participants

Moderator: Jean-Francois Hautemulle - Founder & CEO, Terres Neuves Consulting Limited

Speaker: Jamie Hammond - Head of EMEA and Deputy CEO, iM Global Partners

Speaker: Gandy Gandizanza - Chief Strategy Officer, FundCraft

Speaker: Justin Eede - Director, Spring Capital

Speaker: Andrew Marks - Head of EMEA Distribution, Managing Director, Artisan Partners UK LLP

Lunch

13:10 - 15:00

Best practice digital platforms: Opportunities and Challenges for wealth and asset managers

15:00 - 15:30

Distribution Summit

Participants

Moderator: Bella Caridade-Ferreira - CEO, Fundscape

Speaker: Karen Blatchford - Distribution Director, Quilter

Speaker: David Ferguson - CEO, Nucleus Financial

Speaker: Jens Gammelmark - Head of Product & Digital Offering, PKA Pension

Speaker: Georg Redlbacher - Founding Partner, MBMS

Leading CEOs, CIOs and portfolio managers' best new ideas – Where are the new opportunities in the long-term portfolio and what is the role of alternatives, private markets and global markets?

15:00 - 15:30

FundForum Investment

Participants

Moderator: Sara Sjølin - Financial Correspondent, Berlingske

Speaker: Hans Georgeson - Chief Executive Officer, Royal London Asset Management

Speaker: Pierre Jacquot - CEO, Edmund de Rothschild Real Estate Investment Management

Speaker: Norman Villamin - Senior Managing Director, Chief Investment Officer (Wealth Management), Union Bancaire Privée (UBP)

speaker: Olivier Raingeard de la Blétière - Chief Investment Officer- Banque Neuflyze OBC & Global Head of Equity - ABN Amro Group, Banque Neuflyze OBC

SDGs as a structure for impact investing and wealth management - new ways of financing returns and the proof-points for impact in developed and emerging markets that investors require

15:00 - 15:30

Sustainability & Impact Investor Forum

What data is required to satisfy investors wanting to take greater account of SDG-related risks and impacts?

Participants

Moderator: Mirtha Kastrapeli - Founder & CEO, Beyond Alpha, Columbia Center for Sustainable Investment

Speaker: Will Pomroy - Director of Engagement, Federated Hermes

Speaker: Nathalie Wallace - Head of ESG, Natixis

Speaker: Ben Dear - CEO, Head of Distribution, Osmosis Investment Management

speaker: Turan Çağlayan - Senior Director, Corporate, Projects, Funds, Europe, Middle East and Asia, DEG Invest

Speaker: Tanja Havemann - Founder, Clarmondial

Expert briefing and panel: The next evolution of fund distribution: What you need to know about UCITs to PRIIPs

15:30 - 16:00

Distribution Summit

China Green Tech - Innovators in China Green Tech: progress and opportunities in great new ideas to de-carbonise the economy

15:30 - 16:00

FundForum Investment

Participants

Moderator: Shelley Yang, CFA - CEO and Founder, InvesTAO

Speaker: Simon Hopkins - CEO, Milltrust International Group

Crypto In Wealth Management : what's the opportunity for portfolio managers to invest safely in these solutions and products?

15:30 - 16:30

Sustainability & Impact Investor Forum

Participants

Moderator: Xavier Gomez - CEO & Founder, @INVYO

Speaker: Maximilian Lautenschläger - Co-Founder & Managing Director, Iconiq Holding

Speaker: Leonard Lancia - Founder, Portofino Technologies AG

Speaker: Sina Meier - Director, 21 Shares

Speaker: Daniel Andemeskel - Managing Director UI Enlyte, Head of Innovation Mangement, Universal Investment

Speaker: Josh Wade - Product Manager, Calastone

Innovation in digital fund selection – What new disruptive tools are fund selectors embracing?

16:00 - 16:30

Distribution Summit

Participants

Moderator: Oren Kaplan - Co-Founder and CEO, SharingAlpha

Speaker: Adam Jordan - Director of Investment Research & Management, Paul R. Ried Financial Group

Speaker: Juan Manuel Vicente Casadevall - Director, FondosDirecto

Speaker: Erik Nordenskjöld - Founding Partner, Citroneer

Break

16:30 - 17:00

World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.

17:00 - 18:00

Relax into a well-earned cool down and grab a drink for one of the most talked about films of the year

As part of the IM|Power-WWF collaboration join this exclusive award-winning film about the role of finance in tackling climate change and biodiversity loss.

In this film Mark Carney, David Attenborough and Aviva Investor's Steve Waygood are among those calling for systemic change across the finance sector in this powerful new film. Over 40 minutes, the film combines spectacular footage of the natural world with hard hitting interviews from some of the most influential names in the sector.

WWF (World Wide Fund For Nature) & IMPower collaboration bringing Net Zero to the fore

Regulatory focus in asset management is currently around assessing climate risk. However, urgently reducing emissions is where the brunt of the work needs to be done today and methodically in the years leading up to 2030, in order to achieve a net zero economy. How? The WWF IMPower collaboration will bring together leading institutional investors, corporate influencers and asset managers to discuss how to lead systemic change to achieve net zero.

Participants

Interviewee: Steve Waygood - Chief Responsible Investment Officer, Aviva Investors

SCHEDULE

IMIPOWER DAY 2 - 21/10/2021

FundForum International

20-22 October 2021

The Grimaldi Forum

Monaco

TIME	BREAKFAST BRIEFING: HOW TO BE A BETTER ALLOCATOR IN THE POST-COVID WORLD	DISTRIBUTION SUMMIT	FUNDFORUM INVESTMENT	IMIPOWER LEADERS	SUSTAINABILITY & IMPACT INVESTOR FORUM
07:00	07:15 - Registration and Welcome Coffee 07:45 - How To Be a Better Allocator in the post-Covid World presented by APFI	07:15 - Registration and Welcome Coffee	07:15 - Registration and Welcome Coffee	07:15 - Registration and Welcome Coffee	07:15 - Registration and Welcome Coffee
08:00				08:45 - IMIPOWER Chair's Welcome and Keynote Introduction 08:50 - Geopolitical Keynote: The next big market shock - climate	
09:00				09:20 - As global power-blocs re-align what are the new implications opportunities and threats for investment? 09:55 - Ambitions for COP 26 - Progress on the greening of the financial system towards carbon pricing, global co-operation and regulation.	
10:00	10:40 - Morning Coffee	10:40 - Morning Coffee	10:40 - Morning Coffee	10:05 - Redefining the crucial role of asset management in the greening and modernisation of the financial system from carbon solutions to impact investing: What are going to be the sustainable finance solutions of the future that institutional and retail investors will want to buy that can demonstrate that they do what they say? 10:40 - Morning Coffee	10:40 - Morning Coffee

SCHEDULE

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TIME	BREAKFAST BRIEFING: HOW TO BE A BETTER ALLOCATOR IN THE POST-COVID WORLD	DISTRIBUTION SUMMIT	FUNDFORUM INVESTMENT	IMIPOWER LEADERS	SUSTAINABILITY & IMPACT INVESTOR FORUM
11:00		11:30 - Distribution 2022 – has digital changed things forever? Top boutique asset managers and selectors speak out	11:30 - Leaders of institutional investing - Positioning for the next big thing... Changing long-term pension and insurance investment strategies and partnering for positive change. What is the impact on portfolio management?		11:30 - Opening keynote: The future of impact investing – Solutions for people and planet
12:00		12:00 - How to make a difference as a boutique: Building mid-size and boutique marketing and reputation 12:30 - Fund Administration A futuristic session focussing on the future of fund management and fund administration. New technology positive energetic thought- provoking interactive discussion	12:00 - Battle of the emerging markets 12:40 - The new business of boutiques: Different partnership business models for scale and distribution		12:00 - Small but mighty – how boutiques are perfectly primed for delivering impact 12:30 - Refocusing on the 'S' & the 'G' in impact investing for private wealth
13:00	13:10 - Lunch	13:10 - Lunch	13:10 - Lunch	13:10 - Lunch	13:10 - Lunch
14:00					

SCHEDULE

IMIPOWER DAY 2 - 21/10/2021

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TIME	BREAKFAST BRIEFING: HOW TO BE A BETTER ALLOCATOR IN THE POST-COVID WORLD	DISTRIBUTION SUMMIT	FUNDFORUM INVESTMENT	IMIPOWER LEADERS	SUSTAINABILITY & IMPACT INVESTOR FORUM
15:00		<p>15:00 - Best practice digital platforms: Opportunities and Challenges for wealth and asset managers</p> <p>15:30 - Expert briefing and panel: The next evolution of fund distribution: What you need to know about UCITs to PRIIPs</p>	<p>15:00 - Leading CEOs, CIOs and portfolio managers' best new ideas – Where are the new opportunities in the long-term portfolio and what is the role of alternatives, private markets and global markets?</p> <p>15:30 - China Green Tech - Innovators in China Green Tech: progress and opportunities in great new ideas to de-carbonise the economy</p>		<p>15:00 - SDGs as a structure for impact investing and wealth management - new ways of financing returns and the proof-points for impact in developed and emerging markets that investors require</p> <p>15:30 - Crypto In Wealth Management : what's the opportunity for portfolio managers to invest safely in these solutions and products?</p>
16:00	16:30 - Break	<p>16:00 - Innovation in digital fund selection – What new disruptive tools are fund selectors embracing?</p> <p>16:30 - Break</p>	16:30 - Break	16:30 - Break	16:30 - Break
17:00	<p>17:00 - World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.</p>	<p>17:00 - World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.</p>	<p>17:00 - World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.</p>	<p>17:00 - World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.</p>	<p>17:00 - World Wide Fund for Nature Movie Screening, Drinks & Keynote Interview "Our Planet: Too Big To Fail" The award-winning film about the role of finance in tackling climate change and biodiversity loss.</p>

SESSIONS

IMIPOWER DAY 3 - 22/10/2021

FundForum International

20-22 October 2021
The Grimaldi Forum
Monaco

Welcome coffee and networking break

09:00 - 09:25

Chairman's Welcome - Customer innovation power morning: Disruption and the next-gen customer

09:25 - 09:30

Auric

Radical innovation and disruption in financial services - what will asset managers need to confront over the coming decade?

09:30 - 09:50

Client behavioural and the nudging theory – application in investment management

09:50 - 10:10

Game on – How the younger generation are changing investment and why the industry needs to take stock

10:10 - 10:40

How can the industry adapt to changing client aims and appetite? Understand the data and digital interfaces for the new client.

Participants

Moderator: Daniel Andemeskel - Managing Director UI Enlyte, Head of Innovation Mangement, Universal Investment

Speaker: Anastasia Deryagina - NextGen Business Development, WONA, Credit Suisse Private Banking

Speaker: James Richardson - Head of Client Proposition, Skerritts

Speaker: Cara Williams - Global Leader-Financial Intermediaries and Family Offices, Mercer

Case study: AI and the tech revolution in investment decision-making - Where can AI create solutions and what are the pitfalls?

10:40 - 11:00

Morning Coffee and Networking Break

11:00 - 11:30

Optimising your customer acquisition strategy

11:30 - 12:00

Participants

Moderator: Andy Brown - Founder & Director, Octo Members Group

Speaker: Zoe Robson - Global Head of Innovation, Architas

Innovation strategy roundtable 1 - bringing new products and client segments together

12:00 - 12:30

Innovation strategy roundtable 2 - The strategic role of new entrants in the investment management industry – threat or opportunity to collaborate?

12:30 - 13:00

End of FundForum International

13:00 - 13:10

SCHEDULE

IMIPOWER DAY 3 - 22/10/2021

FundForum International

20-22 October 2021
The Grimaldi Forum
Monaco

TIME	
09:00	<p>09:00 - Welcome coffee and networking break</p> <p>09:25 - Chairman's Welcome - Customer innovation power morning: Disruption and the next-gen customer</p> <p>09:30 - Radical innovation and disruption in financial services - what will asset managers need to confront over the coming decade?</p> <p>09:50 - Client behavioural and the nudging theory – application in investment management</p>
10:00	<p>10:10 - Game on – How the younger generation are changing investment and why the industry needs to take stock</p> <p>10:40 - Case study: AI and the tech revolution in investment decision-making - Where can AI create solutions and what are the pit-falls?</p>
11:00	<p>11:00 - Morning Coffee and Networking Break</p> <p>11:30 - Optimising your customer acquisition strategy</p>
12:00	<p>12:00 - Innovation strategy roundtable 1 - bringing new products and client segments together</p> <p>12:30 - Innovation strategy roundtable 2 - The strategic role of new entrants in the investment management industry – threat or opportunity to collaborate?</p>
13:00	<p>13:00 - End of FundForum International</p>