SESSIONS

SUMMIT DAY - 2020 AGENDA COMING SOON! - 24/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

Summit Registration & Welcome Coffee

08:30 - 09:00

Opening Remarks & Welcome

09:00 - 09:10
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Part of the FundForum How To Think About Sustainability Initiative.

Managing risk, finding new opportunities - Best practice strategies from leading asset managers, fund buyers, asset owners and thought leaders of reference at the cutting edge of ESG

ESG is no longer just a nice-to-have vertical product line. Sustainability is a commitment, a philosophy that is proven at every process in the value chain. For many leading asset owners, governments, stakeholders across Europe a commitment to sustainability and the rapid -transition to a low carbon economy is the number one mission.

FundForum is committed to enabling investment management to innovate and be a catalyst for addressing climate change. Throughout the 2019 flagship event there will be a number of specialist days and sessions addressing how to think about sustainability. From ESG implementation to green bonds, SDGs, the Circular Economy, new business models, impact investing and Gen Z and millennial values, sustainability is centre stage at Fund Forum International. The Summit will focus on:

- Best practice in integrating ESG into your portfolio for climate risk management
- How to apply ESG to accurately identify new investment opportunities
- How select the asset managers illustrating genuine commitment to sustainability: how do they demonstrate this purpose alignment across the business?
- New Metrics and transparency

Participants

Jenny Adams - Global Executive Producer, FundForum International

Opening Remarks & Welcome

09:00 - 09:10
All-day Summit 2: Inside ETFs

Participants

Chairman: John Swolfs - CEO, Inside ETFs

Environment, Social, Governance and business at large. How long-term trends, smart cities and artificial intelligence will enhance ESG goals over the next 25 years.

09:10 - 09:45
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Artificial intelligence is typically associated with rapid change, which could result in a negative sustainable outcome, however smart cities such as Copenhagen have huge potential for improving sustainability. We'll look at how AI can boost sustainable priorities and the link between business models and broader society.

Participants

Moderator: Sara Sjølin - financial journalist, Berlingske Business

Martin Brynskov - Chair, Danish Standard Committee on Smart Cities and Communities, Open & Agile Smart Cities

Rasmus Reeh - Senior Advisor, Copenhagen Solutions Lab

So You Want to Launch A European ETF: What You Need to Know

09:10 - 09:50
All-day Summit 2: Inside ETFs

The writing has been on the wall for a while now: ETFs aren't going away, and more importantly, they're growing. But is there room for more entrants? The simple answer is yes. Hear from our industry experts as they share the road map for launching a successful ETF in Europe

Participants

Moderator: Ben Granje - Managing Director, Beconomics

Panelist: Brian Kelliher - Partner, Dillon Eustance

Panelist: Danielle Reischuk - Senior ETFs & ETPs Sales Manager, Securities & Exchanges, SIX

Panelist: Sean Tuffy - Head of Market & Regulatory Intelligence, CFS EMEA, Citi

Why ESG has become the boardrooms' most pressing issue from asset manager to asset owner.

09:45 - 10:15
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

ESG has leapt into the boardroom in a big way. What does this step change mean across the portfolio and the business and how will politics align to ensure a meaningful impact across the value chain?

Participants

Moderator: Nick Samuels - Head of Manager Research, Redington

Peter Branner - Chief Investment Officer, APG Asset Management

Rick Lacaille - Global Chief Investment Officer, State Street Global Advisors

Jean-Philippe Desmartin - Head of Responsible Investment, Edmond de Rothschild Asset Management

Leon Kamhi - Head of Responsibility, Hermes Investment Management

ETFs & Fund Distribution in an On-Demand Age

09:50 - 10:10
All-day Summit 2: Inside ETFs

It's no secret that traditional UCITs have seen their distribution slow as ETFs have risen to prominence. But that doesn't mean their approaches, ideas or investment philosophies are broken. Hear from ETF veteran and serial entrepreneur Hector McNeil of HANetf as he walks you through how you can unlock your distribution potential through ETFs.

Participants

Presenter: Hector McNeil - Co-CEO, HANetf

Index Construction: Why It Matters More Than You Think

10:10 - 10:45
All-day Summit 2: Inside ETFs

Indexes have come a long way in helping to power the next leg of growth in investing by offering access and reducing costs. But not all indexes are created equal, and those differences can spell double-digit returns, or being fired. In this vital session, we pull back the curtain and address the issues around index construction.

Participants

Moderator: Robert van Beek - Founder & Director, About Life & Finance

Panelist: Hortense Bioy - Director of Passive Strategies and Sustainability Research, Europe, Morningstar

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

Panelist: Kai Aeberli - Director, iBoxx Indices Research & Design, IHS Markit

Comparing and contrasting metrics: How data and ESG ratings can combine to find alpha and do good

10:15 - 10:45
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

As the growth of ESG adoption continues apace investors are rightfully questioning the metrics and data behind ESG ratings and indexes. What makes a strong ESG signal? How important is transparency and disclosure? How does ESG impact performance? What are the ESG metrics driving alpha? Guido Giese weighs up the evidence based on his own research and a peer review of over 2,000 ESG reports.

Participants

Guido Giese - Director, MSCI

Morning Coffee & Networking Break

10:45 - 11:15

Best practice fund selection and ongoing monitoring of external managers

11:15 - 11:45
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Top asset owners and fund buyers discuss their approaches manager research and how they each ensure a genuine commitment to sustainability. We'll explore methodologies being used with the aim of better aligning the investment horizons of asset owners and asset managers to mitigate risk.

Participants

Moderator: Torun Reinhammar - Senior Account Manager, Investor Engagement, CDP

Claire Coquard - Head of Sustainability, Fund Selection Team, FundQuest Advisor

Anders Karsbaek Bertramsen - Head of External Products, Nordea Asset Management

Kirstine Lund Christiansen - Head of ESG, DIP and JØP Pension funds

Janet Muir - Finance Director, The Crop Trust

10 Questions in 20 Minutes With an ETF Market Maker

11:15 - 11:45
All-day Summit 2: Inside ETFs

Everyone thinks they get best execution on their ETF trades, but the truth is, you're leaving money on the table. Join Inside ETFs as we sit down with a leading market maker, asking the questions you need to know the answers to. Learn more about the true depths of ETF liquidity, when to trade, when not to, and how to work with your market maker to ensure best execution

Participants

Interviewer: John Swolfs - CEO, Inside ETFs

Interviewee: Andrew Jamieson - Global Head of ETF Product, Citi

ESG best practice showcase: How the best managers combine performance with purpose

11:45 - 12:15
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

In our next gen ESG showcase find out how asset managers are demonstrating purpose alignment across the business by creating innovative fund solutions.

Participants

Moderator: Bill Gourlay - Global Head of Investment Product Development, Aon

Hilde Jenssen CFA - Head of Fundamental Equities, Nordea Asset Management

David Zahn - Portfolio Manager, Franklin Templeton Investments

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

The Regulatory Outlook: Has New Regulations Had Any Impact?

11:45 - 12:05
All-day Summit 2: Inside ETFs

RDR and MiFID II are old news now, but has anything changed? Hear experts from across the industry share their thoughts on the true impact of these regulations, what's next and the impact of Brexit on the ETF industry.

Participants

Presenter: Jennifer Choi - Chief Counsel, ICI Global

The Road Ahead: The Business Leaders Panel

12:05 - 12:45
All-day Summit 2: Inside ETFs

Fee wars, volatile markets, changes in regulations and much more have all helped push ETFs to prominence. Where can they possibly go from here, and will the threat of mass customization spell the end of days for ETFs? Hear from the biggest names in the industry as they address those questions and yours in this open and frank conversation.

Participants

Moderator: John Swolfs - CEO, Inside ETFs

Panelist: Bryon Lake - Managing Director, Head of International ETFs, J.P. Morgan Asset Management

Panelist: Casie Maurer - Head of Bond ETF Marketing and Head of iShares Product Marketing, BlackRock

Panelist: Martijn Rozemuller - Managing Director, Head of Europe, VanEck

The next evolution: Impact and the SDGs – A look at impact investment analysis across Europe

12:15 - 12:45
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Hear how asset owners and fund selectors are implementing the SDGs into their own strategies, how they are currently working in portfolios and how impact is being measured using the SDGs. Plus, gain insight into the UNPRI strategic plan and the impact investment market outlook.

Participants

Moderator: Emmanuel Parmentier - Partner, ESG Advisory, Indefi

Kaori Shigiya - Head of SDGs and Thematic Investments, UN PRI (Principles of Responsible Investment)

Yvonne Bakkum - CEO and Chair to the Management Board, FMO Investment Management

Andreas Brogaard Buhl - Head of Sustainability and Corporate Governance, Investment Fund for Developing Countries (IFU)

Lunch & Networking Break

12:45 - 14:00

Integrating ESG into the portfolio: A practical view on ESG asset allocation

14:00 - 14:40
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

This top-notch panel we will share their insights into their current asset allocation strategy, where they see ESG going and the impact they believe this will have on their portfolios in long-term.

Participants

Moderator: Anouk Agnes - Deputy Director General, ALFI

Karin Bouwmeester - Sustainability Manager, ABN AMRO Private Bank

Susanne Bolin Gärtner - Head of Fund Selection, Unit-linked insurance, Folksam

Helmut Kotschwar - Head of Sustainability and Investment Management Research, EB-Sustainable Investment Management

Karolina Qvarnstrom - Product Development Manager & Manager Selection, Länsförsäkringar Fondförvaltning AB

Using ETFs to Solve Client Challenges: Sourcing Income

14:00 - 14:30
All-day Summit 2: Inside ETFs

The need for income never goes away, yet the search for it continues to get more difficult. With negative rates still in place and the Fed pausing where can investors source yield? Join our panel of ETF experts and investors as the share ideas and solutions for all portfolio.

Participants

Matt Tagliani - Head of EMEA ETF Product & Sales Strategy, Invesco

Using ETFs to Solve Client Challenges: The Pursuit of Alpha

14:30 - 15:00
All-day Summit 2: Inside ETFs

ETFs are often classified as passive vehicles that give you market access and cheap beta, but ETFs are so much more than that. Better understand how innovations within the ETF market are making these once beta tools are true drivers of alpha and a handy tool for investors looking to boost performance.

Participants

Presenter: André Havas - Senior Partner, CIMalgo AB Stockholm

Presenter: James McManus - Investment manager and head of ETF research, Nutmeg

Presenter: Anthony Kruger - EMEA Head of iShares Smart Beta, Blackrock

Presenter: Gregg Guerin - Senior Product Specialist, First Trust Global Portfolios Ltd

Big ideas: Which are the major growth areas within ESG?

14:40 - 15:30
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Each participant will present for 5 minutes followed by Open Q&A

1. How is ESG being used for innovative finance: Investing in food and health for the greater good

Janet Muir, Director of Finance, CROP TRUST

2. Amazon: Profitably protecting the rainforest

Dr. Maurizio Totta, Entrepreneur, IMPACT INVESTOR

3. Multi-asset class solutions, ESG, sustainability & impact

Andrea Weber, Sustainable Investment Analyst, J SAFRA SARASIN

Participants

Moderator: Anouk Agnes - Deputy Director General, ALFI

Presenter: Janet Muir - Finance Director, The Crop Trust

Presenter: Maurizio Totta - Entrepreneur & Impact Investor; Director, ASF Brazil LDT

Presenter: Andrea Weber - Sustainable Investment Analyst, J Safra Sarasin

Using ETFs to Solve Client Challenges: Access Emerging Markets With ETFs

15:00 - 15:30
All-day Summit 2: Inside ETFs

Emerging markets have become a staple of every investor's portfolio, but this asset class often proves to be tricky, offering investors plenty of risk and rewards. Hear from thought leaders and industry experts as they highlight why ETFs are the most cost-efficient way to access emerging markets.

Participants

Moderator: John Swolfs - CEO, Inside ETFs

Panelist: Manuela Cedarmas - Senior PM, Head of Emerging and Frontier Markets, Tages Capital

Panelist: Xiaolin Chen - Head of International, KraneShares

Coffee & Networking Break

15:30 - 16:00

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The Big "green" Data shake up: Driving responsible production & consumption with supply chain traceability and transparency technologies

16:00 - 16:20
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Gain unique insight into how data is cutting though the "greenwashing" and transforming investment outcomes.

Participants

Mark Griffiths - Leader in sustainable innovation, World Wide Fund For Nature

Coffee & Networking and feel free to join the ESG Summit if you wish

16:00 - 17:20
For Everyone

Client engagement and green sky thinking. The world of aims vs a world of goals.

16:20 - 17:00
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Communicating the benefits of ESG across client segments by creating a balance between green and profitable goals.

Participants

Moderator: Bill Gourlay - Global Head of Investment Product Development, Aon

Benoit Boru - Chief Executive Officer, Insti7

Carina Silberg - Head of Sustainability, Alecta

Herdis Funck - Senior Fund Analyst - Mutual Funds & Financial Products, Credit Suisse

Johanna Landberg - Head of Sustainability, SPP Pension & Försäkring

Closing keynote: How an oil giant is reducing its carbon output and helping to improve the world

17:00 - 17:20
All-day Summit 1: ESG in the Portfolio - Managing Risk, Finding Opportunity

Climate change can have irreversible consequences for our planet, people and economy – if we don't act now. We need to limit global warming to 1.5ºC to avoid uncontrollable climate change. Learns how Denmark's Ørsted is taking a leading role in the fight against runaway climate change.

Participants

Rasmus Skov - Director of Sustainability, Ørsted

FundForum International Early Registration

17:20 - 18:00

FundForum International Welcome Drinks

18:00 - 20:00
For Everyone

Please contact jenny.adams@informa.com to apply to attend - The CEO and Sub-Advisory Partnerships Boardroom Workshop

18:00 - 18:15
The Leaders' Sub-Advisory Business Partnerships Boardroom Workshop

For asset manager CEOs from major houses and boutiques, Heads of Business and top white-label distributors

A working party on distribution strategies for growth – focus on how to structure and win sub-advisory mandates and get the business deal done with leading white-labellers from US, Italy, UK, Switzerland, insurers

Explore new opportunities for specialist asset managers and boutiques in a small group intensive environment with top level peers.

In a highly interactive small group session where everyone will have a chance to have their say, meet leading asset owners and fund buyers designing sub-advisory mandates from US, France, Netherlands, Italy, UK, Switzerland.

Geo-Economic Disrupters War-Game Trilogy Part 1: Imagineering the digital asset future of everything - From Russia with love: "truth or tweet" in the Marco Polo 2.0 world

18:00 - 20:00
Strategic War-game: Geo-Economic Disrupters Trilogy Part 1: From Russia with love: "truth or tweet" in the Marco Polo 2.0 world

Anticipate the playbook in your interactive road-map to the Trump New World Order, helping you leap ahead of the geo-economic reset unfolding NOW – CEOs, CIOs, COOs of asset managers, wealth managers and asset owners, make sure you ride the rise of smart digital assets, dodge asset weaponisation and navigate secure datafication – or else, be roadkill on the Belt & Road.

Trump ushered in the Great Reset with a geo-political wrecking ball of tariffs and tweets. As "globalism" fades, what will take its place? As credit and "free" (QE) money freezes, what is next? How will climate dislocations disrupt? When will Belt and Road replace the old system?

So what should you do? Shaken, not stirred…five tables will war game the geo-economic future

The 5 tables:

1) CyberSecurity
2) Datafication
3) China Belt & Road
4) ClimateTech
5) New Structures and Alliances from Brexit, to Hanseatic League and China-UK bank mergers

Over three rounds led by your master war-gamer Brian Byrne, explore silent battles now unfolding in the realms of CyberSecurity (Hitachi v. Cyber-Ark), Datafication (Palantir v. Alphabet v. ACC), Belt & Road (Middle East v. Europe v. USA) and Climate-Tech (thought school of Warming v. Mini Ice-Age theory) .

Whoever can see or shape the outcomes will reap vast rewards like Dr. Blofeld in SPECTRE James Bond movie. Not only new asset classes (e.g. crypto) but also smart-tech tools (e.g. self-managing assets, smart contracts). Outcomes will be driven by what is perceived TO BE the future: real or fake. Asset Managers who thrive will master block-chain, quantum and AI…to discern which "future" might arrive and when. How will you respond to the Chinese ACC Chain vision of digitizing/ securitizing every physical thing on the planet---from a single pomegranate in a grocery store to an hour spent in an Uber?

Time to unbundle and redesign the role of the Asset Manager: What portion will be AI and what portion will be human discernment? We see AMAZON and ANT FINANCIAL looming large, but who will be the next juggernaut in our A/M backyard (both product and advisory)?

What's the outcome? Setting the scene for the big questions being raised at FundForum 2019

Join Brian Byrne reveal the other parts of the Trilogy throughout the event

Digital Disruptors War Game Trilogy Part 2 - Wednesday 26th June 11.30

Wealth management transformed: When Jung Met Arnold" – How neuro AI and carbon units ("Humans") will terminate first gen robo-advising. How has the game has played out in North America and what can we learn about managing and marketing in the digital era?

Digital Disruptors War Game Trilogy Part 3 - Thursday 27th June 11.30

4D Chess - Digital Data Disruption of Digital Disruptors AKA what now after the demise of the BAATFAANGS? In this third and final part of the War Game Trilogy, as predicted, the long-in-the-tooth FAANGS took a dive in 2018—so who waits in the shadows, like Siamese Fighting Fish, to challenge the remnant(s)?

Participants

Presenter: Brian Byrne - CEO, Futurist, War-Gamer, Aviador Group

Boardroom discussion Part 1 - Best practice revenue share, capabilities, responsibilities, cost with granular pricing differences

18:15 - 18:45
The Leaders' Sub-Advisory Business Partnerships Boardroom Workshop

A top level working party on distribution strategies for growth – a focus on how to structure and win sub-advisory mandates and get the business deal done with leading white-labellers from US, Italy, UK, Switzerland, insurers

18.00 – 20.00 discussions

- What do best practice partnerships look like for discretionary sub-advisory investment solutions – opening new opportunities for specialist asset managers and boutiques
- How to negotiate win-win revenue share, capabilities, responsibilities and understand costs with granular pricing differences
- How to negotiate knowledge sharing and IP
- Service provider – custodians issues/ What can be outsourced so AMs can concentrate on core expertise of adding value?
- What are the distribution implications for the white-labeler

Participants

Moderator: Richard Bruyère - Managing Partner, Indefi

Speaker: Alen Zeljkovic - Managing Director, Products & Solutions, ABN AMRO Private Banking

Speaker: Lorenzo Gazzoletti - CEO, Montpensier Finance

Speaker: Andre Mueller-Wegner - MD, Head, Global Wealth Management Client Coverage, UBS Asset Management

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

Speaker: Furio Pietribiasi - Managing Director, Mediolanum Asset Management

Speaker: Paolo Biamino - Director, Head of Fund Selection, Euromobiliare A.M.

Boardroom Discussion Part 2 – Implications for knowledge sharing and IP in developing successful sub-advisory partnerships

18:45 - 19:15
The Leaders' Sub-Advisory Business Partnerships Boardroom Workshop

Participants

Moderator: Richard Bruyère - Managing Partner, Indefi

Speaker: Lorenzo Gazzoletti - CEO, Montpensier Finance

Speaker: Alen Zeljkovic - Managing Director, Products & Solutions, ABN AMRO Private Banking

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Speaker: Furio Pietribiasi - Managing Director, Mediolanum Asset Management

Speaker: Paolo Biamino - Director, Head of Fund Selection, Euromobiliare A.M.

Boardroom Discussion Part 3 - What can be outsourced so asset managers can concentrate on core expertise of adding value?

19:15 - 19:45
The Leaders' Sub-Advisory Business Partnerships Boardroom Workshop

Open Q&A

19:45 - 20:00
The Leaders' Sub-Advisory Business Partnerships Boardroom Workshop

SCHEDULE

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08:00	**08:30** - Summit Registration & Welcome Coffee	**08:30** - Summit Registration & Welcome Coffee	**08:30** - Summit Registration & Welcome Coffee	**08:30** - Summit Registration & Welcome Coffee	**08:30** - Summit Registration & Welcome Coffee
09:00	**09:00** - Opening Remarks & Welcome **09:10** - Environment, Social, Governance and business at large. How long-term trends, smart cities and artificial intelligence will enhance ESG goals over the next 25 years. **09:45** - Why ESG has become the boardrooms' most pressing issue from asset manager to asset owner.	**09:00** - Opening Remarks & Welcome **09:10** - So You Want to Launch A European ETF: What You Need to Know **09:50** - ETFs & Fund Distribution in an On-Demand Age			
10:00	**10:15** - Comparing and contrasting metrics: How data and ESG ratings can combine to find alpha and do good **10:45** - Morning Coffee & Networking Break	**10:10** - Index Construction: Why It Matters More Than You Think **10:45** - Morning Coffee & Networking Break	**10:45** - Morning Coffee & Networking Break	**10:45** - Morning Coffee & Networking Break	**10:45** - Morning Coffee & Networking Break
11:00	**11:15** - Best practice fund selection and ongoing monitoring of external managers **11:45** - ESG best practice showcase: How the best managers combine performance with purpose	**11:15** - 10 Questions in 20 Minutes With an ETF Market Maker **11:45** - The Regulatory Outlook: Has New Regulations Had Any Impact?			

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12:00	**12:15** - The next evolution: Impact and the SDGs – A look at impact investment analysis across Europe **12:45** - Lunch & Networking Break	**12:05** - The Road Ahead: The Business Leaders Panel **12:45** - Lunch & Networking Break	**12:45** - Lunch & Networking Break	**12:45** - Lunch & Networking Break	**12:45** - Lunch & Networking Break
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14:00	**14:00** - Integrating ESG into the portfolio: A practical view on ESG asset allocation **14:40** - Big ideas: Which are the major growth areas within ESG?	**14:00** - Using ETFs to Solve Client Challenges: Sourcing Income **14:30** - Using ETFs to Solve Client Challenges: The Pursuit of Alpha			
15:00	**15:30** - Coffee & Networking Break	**15:00** - Using ETFs to Solve Client Challenges: Access Emerging Markets With ETFs **15:30** - Coffee & Networking Break	**15:30** - Coffee & Networking Break	**15:30** - Coffee & Networking Break	**15:30** - Coffee & Networking Break
16:00	**16:00** - The Big "green" Data shake up: Driving responsible production & consumption with supply chain traceability and transparency technologies **16:20** - Client engagement and green sky thinking. The world of aims vs a world of goals.		**16:00** - Coffee & Networking and feel free to join the ESG Summit if you wish		

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17:00	**17:00** - Closing keynote: How an oil giant is reducing its carbon output and helping to improve the world **17:20** - FundForum International Early Registration	**17:20** - FundForum International Early Registration	**17:20** - FundForum International Early Registration	**17:20** - FundForum International Early Registration	**17:20** - FundForum International Early Registration
18:00			**18:00** - FundForum International Welcome Drinks	**18:00** - Geo-Economic Disrupters War-Game Trilogy Part 1: Imagineering the digital asset future of everything - From Russia with love: “truth or tweet” in the Marco Polo 2.0 world	**18:00** - Please contact jenny.adams@informa.com to apply to attend - The CEO and Sub-Advisory Partnerships Boardroom Workshop **18:15** - Boardroom discussion Part 1 - Best practice revenue share, capabilities, responsibilities, cost with granular pricing differences **18:45** - Boardroom Discussion Part 2 – Implications for knowledge sharing and IP in developing successful sub-advisory partnerships
19:00					**19:15** - Boardroom Discussion Part 3 - What can be outsourced so asset managers can concentrate on core expertise of adding value? **19:45** - Open Q&A

Asset Manager Leaders' Breakfast: In a low return/high volatility environment, where will organic growth come from and who will be the winners?”

07:45 - 08:20
CEO Invitation Only

Participants

Moderator: Professor Amin Rajan - Founder, Create Research

Speaker: Rick Lacaille - Global Chief Investment Officer, State Street Global Advisors

Fund Buyer Academy – New Digital Tools In The Fund Selector's Tool Kit

07:45 - 08:20
Asset Allocator Only

Introducing new digital tools in the fund selector's tool kit - Gain firsthand knowledge from your peers on the latest fintech developments that are changing the way funds are selected by the professional fund buyers.

The workshop is led by Oren Kaplan, Founder of SharingAlpha, which went live in April 2016 and has already become the world's largest fund rating platform in terms of the number of fund analysts contributing to its ratings.

So far 12,145 vetted fund professionals from 73 different countries have become a part of our growing community.

Participants

Moderator: Oren Kaplan - Co-Founder, SharingAlpha

Speaker: Ilan Sadoun - Co Founder, Chairman, Caspa Family Office & Wealth Management

Speaker: Bart Van Der Ven - Manager and Fund Selector, Accuro Wealth Advisors

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

Speaker: Brad Prosper - Investment Analyst, Xperia Investment Advisors

Registration & Welcome Coffee.

08:00 - 08:25
For Everyone

What are we trying to do in 2019 - Mapping out the goals and innovations that embody FundForum International's 30th edition

08:25 - 08:30
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Presenter: Jenny Adams - Global Executive Producer, FundForum International

Chairman's Welcome

08:30 - 08:40
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Tom Brown - Global Head of Asset Management, KPMG

What does the Triple Data Revolution mean for your business? From mind to machine, product to platform and core to crowd

08:40 - 09:15
Global Megatrends - Auditorium 10 & 11, 1st Floor

From the #1 global expert on leadership in the digital economy

Recent breakthroughs in technologies are transforming the rules of business. Hear the world’s leading commentator on the digital economy surface who wins, who loses and who needs to change with the datification of everything?

"We live in strange times. A machine plays the strategy game Go better than any human; upstarts like Apple and Google destroy industry stalwarts such as Nokia; ideas from the crowd are repeatedly more innovative than those from corporate research laboratories.

Erik Brynjolfsson knows what it takes to master this digital-powered shift: we must rethink the integration of minds and machines, of products and platforms, and of the core and the crowd. The balance now favours the second element of the pair, with massive implications for how we run our companies and live our lives. Brynjolfsson delivers a penetrating analysis of a new world and a toolkit for thriving in it."

Erik will also be discussing his latest research on the Machine Learning Index that identifies which sectors, industries, countries, and specifc companies are most likely to be affected by ML, both in positive and negative ways. How does financial services fare?

Participants

Presenter: Erik Brynjolfsson - Co-Founder & Director, MIT Initiative on the Digital Economy, MIT Sloan School

Technology revolutions, inequality and a new role for asset management to address global challenges of funding health and wealth wellbeing -What does the investment management industry need to do to make this a reality?

09:15 - 09:45
Global Megatrends - Auditorium 10 & 11, 1st Floor

As the world ages, retirement and healthcare will become critical issues that only asset management + data can solve. Gen Z looms large

“These are the large meta trends that are now crashing into governments. There is now no such thing as policy without technology”

Who are the new builders bringing public sector innovation and new asset intelligence together? Using AI, data and neuroscience to solve customer problems across health and wealth

Participants

Presenter: Joe Parkin - Head of UK Sales at iShares and Digital Wealth in UK, Netherlands and Nordics, BlackRock

Speaker: Michael O'Sullivan - Author, "The Levelling"

Speaker: Rose St Louis - Head of strategic partnerships, Zurich UK

Speaker: Bill Gourlay - Global Head of Investment Product Development, Aon

What impact will the digitalisation and tokenisation of assets have on the future shape of investment management? Three different perspectives on the new opportunities and challenges for incumbent and emerging businesses across the value chain.

09:45 - 10:15
Global Megatrends - Auditorium 10 & 11, 1st Floor

How far are we from unleashing industry transformation, democratisation, competitiveness & liquidity?

Participants

Moderator: Joe Saliba - Deputy Chief Executive Officer, CACEIS

Speaker: Neil Ward - CEO, KNEIP

Speaker: Laura Bailey - Founder, Qadre

Speaker: Olinga Ta'eed - Council Member & Expert Advisor, Ministry of Commerce China E-Commerce Blockchain Committee

Speaker: Daniel Andemeskel - Director - Head of Innovation Management, Universal-Investment

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The Asset Manager Interview - How to approach the implementation of the “datafication of everything” – what does the new asset innovation mean in practice for asset managers?

10:15 - 10:30
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Speaker: David Tiller - Head of UK Propositions, Standard Life Aberdeen

Moderator: Pervaiz Panjwani - Managing Director, EMEA Head of Custody & Fund Services, Citi

Morning Coffee & Networking Break

10:30 - 11:10

Introduction Distribution

11:10 - 11:15
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Lena Lundholm-Micko, - Head of Nordic Region, Blackrock

Introducing FundBuyer solutions: content-rich fund showcases on the best new opportunities and high conviction themes. PMs present in-front of an exclusively fundbuyer and asset owner audience

11:10 - 11:15
Investment - Room 173, 1st Floor

Participants

Moderator: Maria Simon - VP, Client Success, eVestment

Introducing Smart Markets Intelligence: thought-leadership, insight, innovation in the next evolution of global markets

11:10 - 11:15
Smart Market Intelligence - Room 181, 1st Floor

Introducing FundForum Ops

11:10 - 11:15
Operations - Room 180, 1st Floor

Introducing Data Capital & Next Gen Asset Management

11:10 - 11:15
Data and Building Next Gen Asset Management - Exhibition Stage

The Global Macro Perspective 2019

11:15 - 11:35
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Michael Hasenstab - Executive Vice President, Chief Investment Officer, Franklin Templeton Investments

Fund Buyer Solutions Day 1

11:15 - 12:45
Investment - Room 173, 1st Floor

A showcase of top performing funds in front of an audience exclusively of buyers

Each fund manager has 10 minutes to present their fund, followed by 5 minutes moderated Q&A to the room at large.

Fund Buyer Solution 1: Driving Growth through Disruptive Innovation
Mark B. Baribeau, CFA, MD, Head of Global Equity, **JENNISON ASSOCIATES**

Fund Buyer Solution 2: Sustainability and UN SDGs
Sonia Fasolo, Head of SRI / SRI Fund Manager, **LA FINANCIÈRE DE L'ECHIQUIER (LFDE)**

Fund Buyer Solution 3: Real world ESG integration
Mark Phelps, CIO Concentrated Global Growth, **ALLIANCE BERNSTEIN**

Fund Buyer Solution 4: Sustainability and growth in a global equity portfolio
Thor Olsson, Global Equities Portfolio Manager, **CLEARBRIDGE INVESTMENTS**

Fund Buyer Solution 5: Sustainable thematic investing in a low growth world
Giles Money, Global Equities Portfolio Manager, **J SAFRA SARASIN**

Fund Buyer Solution 6: Delivering consistent high income for 20 years
Jeremy Cunningham, investment director for fixed income, **CAPITAL GROUP**

Participants

Moderator: Maria Simon - VP, Client Success, eVestment

Presenter: Mark Baribeau, CFA - Managing Director, Jennison Associates

Presenter: Sonia Fasolo - Head of SRI/ SRI Fund Manager, La Financiere de l'Echiquier (LFDE)

Presenter: Mark Phelps - CIO for Concentrated Global Growth, Alliance Bernstein

Presenter: Thor Olsson - Global Equities Portfolio Manager, Clearbridge

Presenter: Giles Money - Global Equities Portfolio Manager, J Safra Sarasin

Presenter: Jeremy Cunningham - Investment Director for Fixed Income, Capital Group

Smart Markets Intelligence – Audience with a global expert 1: Alternative reserves and fiat currencies: Is now the time to go into alternative assets and precious metals? If so which ones, why and for how long?

11:15 - 11:45
Smart Market Intelligence - Room 181, 1st Floor

Participants

Presenter: Mark O'Byrne - Founder & Research Director, Goldcore

Leaders Panel - Enabling an agile front to back operating model: technology, infrastructure and culture

11:15 - 11:45
Operations - Room 180, 1st Floor

Participants

Moderator: Ed Gouldstone - Chief Operating Officer - Asset Management, Linedata

Terry Yodaiken - Head of Operations - EMEA, First State Investments

Fabrice Silberzan - Chief Operating Officer, BNP Paribas Asset Management

Peter Znasik - Director, Head Asset Management Operations, Swiss Re

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Digital Transformation is dead. Welcome to the race for data & implementation. Asset Management enters the 21st century: from investors segmentation to improving customer experience and super API's, discover the best tips from Fintech & leading incumbent.

11:15 - 12:15
Data and Building Next Gen Asset Management - Exhibition Stage

From building stronger brands to developing more relevant products and super APIs, asset management finally enters the 21st century to partner the most sophisticated distributors

Tomorrow most global asset managers will have a chief digital officer.
Discover top tips from our panel of distributors and innovators to succeed in implementing-

- investor segmentation,
- improving the customer experience,
- building stronger brand,
- developing more relevant products
- facilitate distribution

Participants

Moderator: Stephanie Griffiths - CMO, ffyn.co

Speaker: Niall Bellabarba - Director International, Elinvar

Speaker: Anne Choktsang - Head of Innovation, BNP Paribas Asset Management

Speaker: Rémi Cuinat - Head of unit-linked assets monitoring and middle-office - Investment division, Generali

Speaker: Johannes Schubert - COO, Minveo

Speaker: Justine Powell - Founder, Huxley Hub

Winds of change – sentiment shifts after a decade of plenty

11:35 - 11:45
Distribution - Auditorium 10 & 11, 1st Floor

Understanding the direction of travel as regulatory and market pressures dislocate asset management business models. Assessing the latest retail and institutional data to identify future opportunities in the new world of distribution.

Participants

Presenter: Will Mayne - Senior Director, Broadridge Financial Solutions

Spotlight on European Institutional asset owners: Comparing approaches to different investment themes and how to access best solutions - outsourced CIOs, direct fund selection, mandates or via consultants?

11:45 - 12:15
Distribution - Auditorium 10 & 11, 1st Floor

Hear top European Investors discuss how they deal with geopolitical risk, and the impact of new objectives in asset allocation and fund selection.

Participants

Moderator: Dr Oliver Roll - Founding Partner, 4AlphaDrivers

Speaker: Olivier Rousseau - Executive director, FRR (The French pension reserve fund)

Speaker: Inger Huus-Pedersen - Chief Portfolio Manager, PKA

Speaker: Charlotte Mark - Chief Financial Officer, LD Pensions (Lønmodtagernes Dyrtidsfond)

Smart Markets Intelligence – Audience with a global expert 2: "The Levelling - What's Next After Globalization? " A call for a revival of democracies under siege in UK, USA and elsewhere, critical for the stable, productive, and peaceful world we all seek. Implications for asset allocation and thematic investing

11:45 - 12:15
Smart Market Intelligence - Room 181, 1st Floor

Join us to discuss what may become of the world as the liberal, globalized world order disintegrates, and what novel ideas can we propose that may lay the basis for what comes next.

Michael O'Sullivan kicks starts a discussion on his new book, where he chronicles a 'world turned upside down' detailing the twenty-first century's seismic shifts in technology, the global economy, and the balance of power.

"Michael O'Sullivan chronicles a 'world turned upside down' in this fascinating new book detailing the twenty-first century's seismic shifts in technology, the global economy, and the balance of power. His call for a revival of democracies under siege in Britain, the US, and elsewhere is critical for the stable, productive, and peaceful world we all seek."—Nicholas Burns, professor, Harvard University, and former US Under Secretary of State

Participants

Presenter: Michael O'Sullivan - Author, "The Levelling"

Outsourcing 3.0: Overcoming the key obstacles to forming effective strategic partnerships – scale, expertise, alignment

11:45 - 12:15
Operations - Room 180, 1st Floor

- Deciding which functions should be outsourced
- Choosing your partners/solutions
- Mitigating risk
- Enabling flexibility for future development

Participants

Moderator: Rupert Bull - CEO & Co-Founder, The Disruption House

Greg Thornton - Managing Director, International Funds, Former Chief Operating Officer, Principal Global Investors

Karen Zachary - COO, CRUX Asset Management

Matthew Bax - Managing Director, Custody & Fund Services, Citi

Identifying the strategies and solutions where active asset managers can deliver tangible value as we move towards more passive funds and zero fees

12:15 - 12:45
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Hortense Bioy - Director of Passive Strategies and Sustainability Research, Europe, Morningstar

Speaker: Jamie Hammond - CEO, AllianceBernstein Ltd (UK)

Speaker: David Wright - EMEA Head of Product Strategy for Systematic Active Equity (SAE) business, Blackrock

Speaker: Nick Lyster - Global Head of Wealth Advisory Services, Principal Global Investors

Speaker: Bryon Lake - Managing Director, Head of International ETFs, J.P. Morgan Asset Management

Speaker: Stuart Parker - President & CEO, PGIM Investments

Smart Markets Intelligence – Audience with a global expert 3: The strategic implications of what the Chinese Ministry of Commerce's China E-Commerce Blockchain Committee means to the market forces: controlling a forecasted $100 trillion of which China owns 70%

12:15 - 12:45
Smart Market Intelligence - Room 181, 1st Floor

How regional powers from China to the Middle East are using blockchain for strategic intent – promoting hard and soft influence both internally and externally to the world.

Participants

Olinga Ta'eed - Council Member & Expert Advisor, Ministry of Commerce China E-Commerce Blockchain Committee

Best in Class Innovation Showcase: Brand new outsourcing solutions

12:15 - 12:45
Operations - Room 180, 1st Floor

Introduction - Process Optimisation: KPMG

FX Trading: NORTHERN TRUST

GPI Payments: SWIFT

Participants

Maren Schmitz - Partner, KPMG

Rowan Gillespie - Vice President – Global Foreign Exchange Sales, Northern Trust

Charifa El Otmani - Head of GPI EMEA, Swift

An interview with an AI Innovator - How AI innovation is reshaping investment management -- New use cases and a glimpse into the AI R&D pipeline

12:15 - 12:35
Data and Building Next Gen Asset Management - Exhibition Stage

Participants

Presenter: Miroslav Petrov - Head of Innovation & Co-founder, Fortia Financial Solutions

Moderator: Jenny Adams - Global Executive Producer, FundForum International

Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases

12:45 - 14:00

Lunchtime Programme on the Data & Next Gen Leadership Stage

13.00-13.30 An Audience With... FundForum's 2019 Distinguished Keynote

Erik Brynjolfsson, Director, Initiative on the Digital Economy MIT, Professor**, MIT SLOAN SCHOOL OF MANAGEMENT**

*I*n discussion with **Jenny Adams,** Global Executive Producer, **FUNDFORUM INTERNATIONAL**

Hear Erik and Jenny discuss such themes as where machine learning works best and where not- and what does that mean for human jobs? How should governments, companies and individuals respond? What about the socio-economic backlash as technology adversely affects equality. How can it positively impact inclusion? Do we need to think about Universal Basic Income ? What is the role of education and life long learning and how should our systems be changing? What are the implications for talent and HR and the impact of algorithmic bias.

13.30-13.55 Quickfire Boutique Fund Showcase with Live Investor Feedback

Antony John, CEO, **ILEX & panel of fund buyer judges**

Investor Judges, **Manuela Cedermas**, **TAGES CAPITAL**; **Adams Choppin, FIS**

Back for it's 7th successive year, 8 boutique funds will give a 90 second pitch about what gives their fund its unique edge. The fund buyer judge will then comment on the pitch and give marks for clarity of proposition and charisma of delivery. The winner will receive glory and a bottle of champagne.

Come and cheer boutique fund managers as they pitch their funds in 90 seconds flat - and then are scored on clarity and charisma by our panel of investor judges. Who will win and gain glory and profile?

1. José Luis Martínez Caamaño - Investing in FX spot with algorithm trading using AI.**ALALUZ CAPITAL**

2. Maxime Bouan, Seedstars Africa Ventures, **FIRST GROWTH VENTURES**

3. Brian Bader, Active Dynamic Growth Equity, **AXIOM INVESTORS**

4.Nick Thompson, Westfield's Sustainable Growth strategy, **WESTFIELD**

5.Tomas Dacys, INVL Emerging Europe bond fund, **UAB INVL ASSET MANAGEMENT**

6.Caroline Frelet-desclaux, Tocqueville Value Europe, **TOQUEVILLE FINANCE**

7. Maciej Woznica, Value Bonds - Ethical Global High Yield, **SPARINVEST**

Participants

Presenter: Erik Brynjolfsson - Co-Founder & Director, MIT Initiative on the Digital Economy, MIT Sloan School

Moderator: Jenny Adams - Global Executive Producer, FundForum International

Moderator: Antony John - Principal, Ilex Associates

Speaker: Manuela Cedarmas - Senior PM, Head of Emerging and Frontier Markets, Tages Capital

Speaker: Adam Choppin - Manager Research – International Equities, FIS Group, Inc.

Changes in front end distribution models and the battle for asset allocation: Post Mifid 2 the world is moving fast towards discretionary and model portfolios, what are the new business models, distribution dynamics and partnership opportunities for third party funds? Plus Sli.do Survey

14:00 - 14:30
Distribution - Auditorium 10 & 11, 1st Floor

Hear from white label organisations delivering engaging interface and asset allocation models for asset managers, distributors, institutions using sophisticated quant techniques - to others changing their business models eg

- The shift towards discretionary and its impact on sales flows – making markets much more volatile and holding periods much less sticky.
- The rise of model portfolios – another aspect of the same trend but one that makes the distributor into the asset manager and potential competitor of asset managers, particularly if the portfolios are reliant on passive funds.
- Asset managers becoming distributors – Fidelity is already there but Schroders recently announced a D2C initiative with Lloyds, and there are other examples.
- Disrupters – particularly evident in some Asian markets.

Investec - Investec have launched Click & Invest service – model portfolios with active management

UBS - a perspective from a big universal bank on their changing thinking

AXA Architas - Multi- manager and perspectives on Asia

Participants

Moderator: Diana Mackay - Managing Director, Global Distribution Solutions, Broadridge

Speaker: Hans Georgeson - Chief Executive Officer, Axa Architas

Speaker: Pierre Adrien Domon - Member of the Management Committee, Fund Channel

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

Speaker: Adina Grigoriu - Actuary, Active Asset Allocation expert, Lady of FinTech 2017, Active Asset Allocation

Speaker: Jeffrey Bloom - Senior Relationship Manager, UBS Global Wealth Management

New asset allocation in the great market reset: what are the new asset classes and new asset allocation tools in a period of volatility

14:00 - 14:30
Investment - Room 173, 1st Floor

How are weightings and approaches changing?

Participants

Moderator: Professor Amin Rajan - Founder, Create Research

Speaker: Wei Li, CFA - Head of EMEA Investment Strategy for BlackRock ETF & Index Investments, BlackRock

Speaker: Théodore Economou - CIO, Multi-Asset, Lombard Odier Asset Management (Switzerland) SA

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

Speaker: Florian Ielpo - Head of Macroeconomic Research, Cross Asset Solutions, Unigestion

The phenomenal and necessary growth in global green finance – Opportunities and challenges for issuers, lenders, asset managers and governments

14:00 - 15:00
Smart Market Intelligence - Room 181, 1st Floor

Challenges, progress and investment opportunities in scaling climate finance and green issuance globally

14.00 – 14.10 Introduction by **Allan Walker, DEPARTMENT FOR INTERNATIONAL TRADE (DIT)**

14.10 – 14.30 Part 1 – Overview of the opportunity potential of green finance: The role of governments and multilateral institutions in enabling private sector green finance

14.30 – 14.50 Part 2 – Green Finance and Capital Markets: What are the most relevant instruments, trends and innovations for issuers and asset managers?

14.50-15.00 Part 3 – Open discussion and green finance survey

Participants

Moderator: Allan Walker - Green Finance Specialist, Financial and Professional Services Group, Department for International Trade UK (DIT)

Speaker: Eila Kreivi - Head of the Capital Markets Department and Director,, European Investment Bank

Speaker: Karl Smith - Managing Director (MIRA), Green Investment Group, Green Investment Group, Macquarie

Speaker: Graham Smith - Director, Sustainable Finance Unit, HSBC

Speaker: Yan Wang - Deputy General Manager, Bank of China UK

Speaker: Aled Jones - Head of Sustainable Investment, Europe, FTSE Russell, & Information Services Division, London Stock Exchange Group

Speaker: Dan Wells - Partner, Foresight Group

Speaker: Vasiliki Pachatouridi - Head of EMEA iShares Fixed Income Product Strategy, Blackrock

(Even More) Disruption in the back office: Latest market trends in emerging and developing tech

14:00 - 14:35
Operations - Room 180, 1st Floor

Industry leading service providers discuss how AI, RPA and blockchain are developing from theory to implementation. What new entrants are on the horizon and, amidst the plethora of new tech, how are they identifying which ones actually have the power to radically change the operations landscape?

Participants

Moderator: Olivia Vinden - Director, Head of Fintech & Innovation, Alpha FMC

Mathieu Maurier - Country Head, Luxembourg, Societe Generale Securities Services

Paul Ellis - Global Head of Regulatory Product Development, HSBC Securities Services

Arnaud Misset - Chief Digital Officer, Caceis

Paul Kilcullen - Head of Custody & Funds Services Ireland, Citi

Scott Kurland - Global Head of Product & Marketing, SS&C Singularity

Building the next gen investment process and making it relevant: New leaders in behavioural quantimental & machine learning in wealth management

14:00 - 15:00
Data and Building Next Gen Asset Management - Exhibition Stage

How machine learning is being used in alternative risk premia. How AI/ML can assist portfolio managers with regard to crowding or factor timing? Can AI/ML tools improve execution and signal robustness?

Portfolio managers can also use ML algorithms to select and rate investment opportunities that have attractive environmental, social, and governance (ESG) factors. The panel could also explore how ML tools are increasingly being used to incorporate ESG criteria into the quantitative investments process. Could this application unearth new alpha sources?

14.00-14.10 **Research Briefing - What the alpha generating lifecycle looks like for the best managers and the worst managers, and what can be done to improve?**
Clare Flynn Levy**,** Co-Founder, ESSENTIA ANALYTICS

14.10-14.35 **What the buyers look for**
Sandrine Ungari, Head of cross-asset quant research, SOCIÉTÉ GÉNÉRALE
Dr Matthew Killeya, co-CIO at Cantab, GAM SYSTEMATIC
Alex Gioulekas, Portfolio Manager, Prognosis Machines, COELI ASSET MANAGEMENT

14.35-15.00 **New product use cases**
Dan Kemp, Chief Investment Officer, EMEA, MORNINGSTAR
Clare Flynn Levy, Co-Founder, ESSENTIA ANALYTICS
Stephen J. Barnett, CEO UTIL

Participants

Presenter: Clare Flynn Levy - CEO and Founder, Essentia Analytics

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

Speaker: Dan Kemp - Chief Investment Officer, Morningstar Investment Management Europe Ltd

Speaker: Sandrine Ungari - Head of cross-asset quantitative research, Société Générale

Speaker: Alex Gioulekas - Prognosis Machines Fund, Coeli AB

Speaker: Matthew Killeya - co-CIO at Cantab, GAM Systematic

Speaker: Stephen J. Barnett - CEO & Founder, Util

What will the private bank of the future look like?

14:30 - 15:00
Distribution - Auditorium 10 & 11, 1st Floor

A discussion with representatives of many different strands of thought in the wealth management world. They will each present their vision for what the private bank of the future will look like:

Providers of market intelligence and efficient investment strategies: The traditionalist: James Bevan, Head of Investments, CCLA (Confirmed)

The human and machine combination:

Philip Watson, Chief Innovation Officer, Citi Private Bank (Confirmed)

The Machine:

Stephen Wall, Co-Founder, The Wealth Mosaic (Confirmed)

The family and business network:

Luc Leclere, International Europe Market Manager, BNP Paribas Wealth Management (Confirmed)

Private Bank as therapist and life coach:

Ylva Baeckstrom, Lecturer in Banking & Finance, Kings College London

Participants

Moderator: Yuri Bender - Editor-in-Chief, Professional Wealth Management, Financial Times

Speaker: James Bevan - Chief Investment Officer , CCLA Investment Management

Speaker: Dr Ylva Baeckstrom, PhD - Lecturer in Finance, King's Business School, King's College London

Speaker: Philip Watson - Head of the Global Investment Lab and Chief Innovation Officer, CITI Private Bank

Speaker: Stephen Wall - Co-founder, The Wealth Mosaic

Speaker: Luc Leclere - International Europe Market Manager, Head of Key Clients - Member of the Executive Committee, BNP Paribas Wealth Management

Where to find consistent returns with active alpha: How to blend stock-pickers and growth – what are going to be the high conviction investment themes are set to deliver stellar returns in the next decade?

14:30 - 15:00
Investment - Room 173, 1st Floor

Participants

Moderator: Professor Amin Rajan - Founder, Create Research

Speaker: Javier Rodriguez-Alarcon - Head of Quantitative Investment Strategies EMEA, Goldman Sachs Asset Management

Speaker: Thor Olsson - Global Equities Portfolio Manager, Clearbridge

Speaker: Valentijn van Nieuwenhuijzen - CIO, NN Investment Partners

How to be smart about Intelligent Automation: Driving the desired benefits and calculating the impact on ROI

14:35 - 15:00
Operations - Room 180, 1st Floor

In an environment where costs are under pressure, and intelligent automation is relatively new for our industry, how should managers start their intelligent automation journeys, overcome known technical and people challenges, and drive out the desired ROI

Participants

Presenter: Reema Kotecha - Director, EY Wealth and Asset Management Advisory, EY

Phil Tattersall - Director - UK Wealth & Asset Management Data and Analytics Advisory Practice & EMEIA Lead for Intelligent Automation in Wealth & Asset Management, EY

Are pension investors losing out on returns from private and illiquid markets? How can we create access to private markets for retail investors through intermediaries?

15:00 - 15:30
Distribution - Auditorium 10 & 11, 1st Floor

The shift from public markets to private markets by institutional investors could have “profound implications” for retail investors, said the CFA Institute.The organisation found investors were seeing fewer IPO investment opportunities and “could miss out on the returns provided by rapidly growing new businesses whilst they are kept in private hands”.In a report, ‘Capital Formation: The Evolving Role of Public and Private Markets’, CFA Institute said it was estimated that the median time to IPO for US companies has risen from 3.1 years in 1996, to 7.7 years in 2016.The increasing ability of entrepreneurs to access private capital has encouraged a shift from public market capital-raising, and by the time firms do IPO, “much of the value [was] already extracted”.CFA Institute’s paper makes some policy recommendations including making access to private market investments for pension savers through professional intermediaries.The organisation also called for better disclosure and transparency standards in private markets, where the large amount of capital waiting to be invested – known as 'dry powder' – has increased in recent years and there is a growing perception that valuations are high with no discount for the illiquidity of the underlying investments. Sviatoslav Rosov, director of capital markets policy at CFA Institute, said: “Individuals are being told to save for their retirements by investing in the public markets at a time when companies are increasingly preferring to avoid or defer a public listing.“This may deprive savers of the ability to participate in high-growth business models and further promote the sense that markets are being operated for the benefit of ‘insiders’.”

Participants

Moderator: Ric van Weelden - Senior Partner, INDEFI

Speaker: Tara Gillespie - Senior Vice President, Private Assets, Redington

Speaker: Ingo Heinen - Head of BlackRock Alternatives Specialists Team, EMEA, Blackrock

Speaker: Julian Temes - Head of Investment Management, Strategic Implementation, Zurich Group

Speaker: Johnny El-Hachem - CEO, Edmond de Rothschild Private Equity

Speaker: Olivier Fines - Head of Advocacy, EMEA, CFA Institute

Innovation in unit-linked insurance solutions: A revolution in markets where insurance has been the primary savings vehicle - France, Germany and Italy

15:00 - 15:30
Investment - Room 173, 1st Floor

Participants

Moderator: Agnès Lossi - Partner, Indefi

Speaker: Denis Cohen-Bengio - Director, Financial Solutions, Groupama Gran Vie

Speaker: Betti Candia - CIO, Zurich Investments Life, Italy

Speaker: Hubert Zeller - Head Third Party Fund Structuring, UBS Asset Management

Speaker: Moritz Gribat - Head of Structuring and Asset Manager Selection, Generali

ESG in Illiquid infrastructure investing blending public and private markets: Best practice Scandinavian active stewardship in aligning the investment value chain into the portfolio - how to manage investors innate short-termism

15:00 - 15:30
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Jesper Kirstein - CEO, Kirstein AG

Speaker: Anders Schelde - CIO, MP Pension

Speaker: Rasmus Juhl Pedersen - Head of ESG, Paedagogernes Pension (PBU) and chairman of Dansif

Speaker: Peter Køhler Lindegaard - Head of Investments, Industriens Pension

Speaker: Henrik Nøhr Poulsen - CIO, PFA ASSET MANAGEMENT

True transparency in the fund distribution chain: Myth or reality?

15:00 - 15:30
Operations - Room 180, 1st Floor

Is this simply a dream or are we getting to a truly transparent operating model? Will disruptive blockchain models / new technologies provide the solution ?
Our panel will discuss the latest trends, needs, challenges and solutions in their quest to provide new transparency models for the funds industry.

Participants

Moderator: Stephan Pouyat - Global Head of Capital Markets, and Funds and ETF Services, Euroclear

Marcus Miholich - Managing Director, Head of Capital Markets EMEA & APAC, State Street SPDR ETFs

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Quant and the new AI-gorithmic trading: How the arrival of data is transforming trading at warp speed and what this means for your business - and wider market stability

15:00 - 16:00
Data and Building Next Gen Asset Management - Exhibition Stage

Are quants responsible for the latest market volatility?

From Autonomous Learning Investment Strategies to reinforcement learning based AI - hear some of the latest ideas from the next generation asset managers

15.00-15.10 New Research Briefing: machine learning and signal processing within algorithmic trading

Drew D Mann, Doctoral Candidate, UNIVERSITY COLLEGE LONDON, COINSTRATS

15.10-15.40 Panel Discussion

15.40-16.00 Open Q&A

Participants

Moderator: Alexandru Agachi - Co Founder, COO, Empiric Capital

Presenter: Andrew Mann - Doctoral Candidate, University College London, Coinstrats

Speaker: Niklas Hojman - COO & Co-Founder, Century Analytics

Speaker: Guillaume Vidal - CEO & Co-Founder, Walnut Algorithms

Speaker: Mads Ingwar - CEO & Founder, Kvasir AI

Institutional sub-advisory mandates: Development of partnerships and discretionary subadvisory

15:30 - 16:00
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Andreas Pfunder - Founder and CEO, instiHub Analytics

Speaker: Stéphane Corsaletti - CEO, ABN AMRO Investment Solutions

Speaker: Paolo Biamino - Director, Head of Fund Selection, Euromobiliare A.M.

Speaker: Rob Johnson - Head of Investments, Nedgroup Investments

Speaker: Michael Curtin - Partner, Mercer Investment Consulting

Everything you always wanted to know about IBOR* but were afraid to ask

15:30 - 16:00
Investment - Room 173, 1st Floor

Participants

Presenter: Marieke van Eenennaam - Associate Partner, Wealth & Asset Management, EY

Speaker: Paul Ellis - Global Head of Regulatory Product Development, HSBC Securities Services

Speaker: Ulrik Strandgaard - Senior Product Owner, SimCorp

From ESG & SRI to Impact Investing, from liquid to non-liquid investments - a snap shot of what leading family offices across Europe really want!

15:30 - 16:00
Smart Market Intelligence - Room 181, 1st Floor

What challenges investors encounter? Are there any differences or an advancement to due diligence for "traditional" funds versus venture capital, private equity and direct investment? What are the experiences so far in the product selection procedure?

What significant role will ESG, SRI and impact investing play in family office investments in the future?

Participants

Moderator: Markus Hill - Independent, Asset Management Consultant

Speaker: Christoph Kind - CEO, head of asset allocation, Marcard, Stein & Co

Speaker: Marcel Müller - Partner , HQ Trust

Speaker: Frédéric Guibaud - Analyst, AlphaBet Asset Management SA (AlphaBet

Speaker: Florian Schmitt - CIO, Schmitt Unternehmensgruppe, Fulda

Innovations in platform-based solutions from across the ecosystem: Finding efficiencies, increasing transparency, cutting costs and improving client experience

15:30 - 16:00
Operations - Room 180, 1st Floor

Participants

Moderator: Gillian Hepburn - Intermediary Solutions Director, Schroders

Gavin Lavelle - Managing Director, EMEA, Charles River Development, A State Street Company

Aaron Overy - Head of Client and Manager Development, AMX

Wava Bodin - Founder & CEO, Fundrella AB

Afternoon Coffee & Networking Break

16:00 - 16:30

Client Experience - the last battleground. Delivering clients 'service alpha'

16:30 - 17:05
Distribution - Auditorium 10 & 11, 1st Floor

With shrinking buy lists, shrinking margins and growing allocations to passive, asset managers are required to broaden the ways that they demonstrate value to sophisticated investors. In turn, fund investors require more information and support from their asset managers. What's in store for the future of engagement between asset managers and fund investors?

Participants

Moderator: Roland Meerdter - Co-Founder, Door

Speaker: Midhat Syed - Manager Researcher, Skagen Funds

Speaker: Ian Crispo - Head of Fund Selection, Deutsche Bank Wealth Management

Speaker: Guendalina Bolis - CEO , Inversis Gestion

Speaker: Will Nott - CEO, SYZ Asset Management & President of EFAMA

Speaker: Richard Garland - Managing Director, Global Advisor, Investec Asset Management

Speaker: Colin Fitzgerald - Head of EMEA Distribution, Invesco

Impact investment evolution- Building metrics, scale and pipeline in impact to maximise distribution

16:30 - 17:30
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Evita Zanuso - Senior Director, Big Society Capital

Speaker: Paul Miller - CEO, Bethnal Green Ventures

Speaker: Michelle O'Keeffe - Governance and Sustainability Analyst, Positive Change Fund, Baillie Gifford

Speaker: João Ferrão dos Santos - Impact Investing Principal - decoding impact, Maze

Speaker: Malene Bason - Founder, FutureImpact

Speaker: Søren Stig - Partner, Nordic Impact

Deloitte Survey: Future Asset Management strategy across distribution, product development, regulation – and what are the asset servicing requirements to meet strategic objectives?

16:30 - 17:30
Operations - Room 180, 1st Floor

16.30-17.00 Part 1 - Distribution 2.0: How will technology redefine relationships with asset management clients?

Asset managers' distribution teams are under sustained pressure, as growing headcounts are met with flat inflows and declining contribution. At the same time, asset managers' buyers have changed dramatically, while rapid innovation has transformed distribution across industries. After years of high margins that supported labor-intensive models, asset managers are no longer insulated from these trends. In his talk, Dan will discuss the importance of distinctive client experience in distribution success, how winning firms will embrace technology to deliver a distinctive client experience at scale, and what that means for their organization and their partner firms.

17.00-17.30 Part 2 - Panel Discussion

- Evidence from market practice, use cases: how do Asset Managers leverage technology to facilitate distribution and how do Asset Servicers enable this process?
- Data management is key – focus on use cases currently deployed within your organisations
- Technology can facilitate regulatory compliance – myth or reality?
- Takeaways on the recent technology/business joint ventures observed in the market - how will competition evolve following these new models?

Participants

Speaker: Dan Worthen - Senior Manager, Digital Financial Services, Deloitte

Moderator: Simon Ramos - Partner, IM Advisory & Consulting Leader, Deloitte

Panellist: Clive Bellows - Head of Global Fund services EMEA, Northern Trust

Panellist: Ileana Sodani - Managing Director, BNY Mellon

Panellist: Ugo Sansone - General Manager, Allfunds Bank International

Panellist: Tomas Murillo - Head of International, Degroof Petercam Asset Management

Next generation digital assets and tokenisation in financial services: Exploring new trading models linking the customer-driven meta-system together of payments, insurance and investments.

16:30 - 17:00
Data and Building Next Gen Asset Management - Exhibition Stage

In the future smart contracts combined with AI will eliminate the role of the trader -and to some extent the role of Asset Managers, but will be able to draw the dotted lines that connect the meta-system together for trading, payments, insurance and some investments.

In this session learn and discuss with a wide variety of the most successful innovators in the field -

Understanding difference between utility and security tokens – what is the regulatory view about which ones are likely to be used?

• Role of tokenisation on asset classes on the economy

• Tokenisation of the economy and the future of fiat money – future of finance –

• View of different regulators around the world - if a large central bank such as China is believing it then we need to take it seriously even if European regulators are more wary

• User cases from real estate to impact investing

Participants

Moderator: Olinga Ta'eed - Council Member & Expert Advisor, Ministry of Commerce China E-Commerce Blockchain Committee

Speaker: Yuri Lobyntsev - CTO & Co-Founder, Cindicator

Speaker: Philip Fortio - CEO & Founder, TokenBlocks

Speaker: Jakob Drzazga - CEO, Brickblock

Blockchain innovations in making asset management inclusive and transparent: Next generation use cases from around the world

17:00 - 17:30
Data and Building Next Gen Asset Management - Exhibition Stage

Participants

Moderator: Olinga Ta'eed - Council Member & Expert Advisor, Ministry of Commerce China E-Commerce Blockchain Committee

Speaker: Kate Webber - MD, Head of Product Development, Calastone

Speaker: Alexander Chekanov - Chief Architect, National Settlement Depository of Russia

Speaker: Nick Williamson - CEO & Founder, Qadre

The evolving manager selection process – a new way forward from sophisticated investors and consultants

17:05 - 17:35
Distribution - Auditorium 10 & 11, 1st Floor

How are sophisticated investors adopting a new approach to manager selection? Hear from a panel of institutional investors on the process, the pitfalls and the outcomes.

Participants

Moderator: Jeremy Lee - Director of Institutional Business – EMEA, eVestment

Speaker: Anders Karsbaek Bertramsen - Head of External Products, Nordea Asset Management

Speaker: Kasper Hagedon - Portfolio Manager, ADDEK ApS

Speaker: Michael Simmeth - Head of Manager Selection, LGT Capital Partners

Day 1 Closing Keynote: From the global giants of technology VC to next gen digital leaders, what is going to be the most significant technological development of benefit to humanity in the next five years?

17:35 - 18:00
Global Megatrends - Auditorium 10 & 11, 1st Floor

How leaps in AI and machine learning are improving the lives of people: next gen leadership on some of the world's most cutting-edge innovations transforming the world

Participants

Moderator: Olivia Vinden - Director, Head of Fintech & Innovation, Alpha FMC

Speaker: Dov Moran - Managing Partner, Grove Ventures

Speaker: Eric Osiakwan - Tech entrepreneur, angel investor and champion of the KINGS of African digital economy, Chanzo Capital

Speaker: Sakshi Chhabra - Director, Softbank Investment Advisers

FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)

18:00 - 20:00

Hosted by J.P.Morgan

SCHEDULE

MAIN CONFERENCE DAY ONE - 2020 AGENDA COMING SOON - 25/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

TIME	ASSET ALLOCATOR ONLY	CEO INVITATION ONLY	DATA AND BUILDING NEXT GEN ASSET MANAGEMENT - EXHIBITION STAGE	DISTRIBUTION - AUDITORIUM 10 & 11, 1ST FLOOR	FOR EVERYONE	GLOBAL MEGATRENDS - AUDITORIUM 10 & 11, 1ST FLOOR	INVESTMENT - ROOM 173, 1ST FLOOR	OPERATIONS - ROOM 180, 1ST FLOOR	SMART MARKET INTELLIGENCE - ROOM 181, 1ST FLOOR
07:00	**07:45** - Fund Buyer Academy – New Digital Tools In The Fund Selector's Tool Kit	**07:45** - Asset Manager Leaders' Breakfast: In a low return/high volatility environment, where will organic growth come from and who will be the winners?"							
08:00					**08:00** - Registration & Welcome Coffee.	**08:25** - What are we trying to do in 2019 - Mapping out the goals and innovations that embody FundForum International's 30th edition **08:30** - Chairman's Welcome **08:40** - What does the Triple Data Revolution mean for your business? From mind to machine, product to platform and core to crowd			

SCHEDULE

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09:00						**09:15** - Technology revolutions, inequality and a new role for asset management to address global challenges of funding health and wealth wellbeing -What does the investment management industry need to do to make this a reality? **09:45** - What impact will the digitalisation and tokenisation of assets have on the future shape of investment management? Three different perspectives on the new opportunities and challenges for incumbent and emerging businesses across the value chain.			

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10:00	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:15** - The Asset Manager Interview - How to approach the implementation of the “datafication of everything” – what does the new asset innovation mean in practice for asset managers? **10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break	**10:30** - Morning Coffee & Networking Break

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11:00			**11:10** - Introducing Data Capital & Next Gen Asset Management **11:15** - Digital Transformation is dead. Welcome to the race for data & implementation. Asset Management enters the 21st century: from investors segmentation to improving customer experience and super API's, discover the best tips from Fintech & leading incumbent.	**11:10** - Introduction Distribution **11:15** - The Global Macro Perspective 2019 **11:35** - Winds of change – sentiment shifts after a decade of plenty **11:45** - Spotlight on European Institutional asset owners: Comparing approaches to different investment themes and how to access best solutions - outsourced CIOs, direct fund selection, mandates or via consultants?			**11:10** - Introducing FundBuyer solutions: content-rich fund showcases on the best new opportunities and high conviction themes. PMs present in-front of an exclusively fund-buyer and asset owner audience **11:15** - Fund Buyer Solutions Day 1	**11:10** - Introducing FundForum Ops **11:15** - Leaders Panel - Enabling an agile front to back operating model: technology, infrastructure and culture **11:45** - Outsourcing 3.0: Overcoming the key obstacles to forming effective strategic partnerships – scale, expertise, alignment	**11:10** - Introducing Smart Markets Intelligence: thought-leadership, insight, innovation in the next evolution of global markets **11:15** - Smart Markets Intelligence – Audience with a global expert 1: Alternative reserves and fiat currencies: Is now the time to go into alternative assets and precious metals? If so which ones, why and for how long? **11:45** - Smart Markets Intelligence – Audience with a global expert 2: "The Levelling - What's Next After Globalization? " A call for a revival of democracies under siege in UK, USA and elsewhere, critical for the stable,

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									productive, and peaceful world we all seek. Implications for asset allocation and thematic investing

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12:00	**12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:15** - An interview with an AI Innovator - How AI innovation is reshaping investment management -- New use cases and a glimpse into the AI R&D pipeline **12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:15** - Identifying the strategies and solutions where active asset managers can deliver tangible value as we move towards more passive funds and zero fees **12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:15** - Best in Class Innovation Showcase: Brand new outsourcing solutions **12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases	**12:15** - Smart Markets Intelligence – Audience with a global expert 3: The strategic implications of what the Chinese Ministry of Commerce's China E-Commerce Blockchain Committee means to the market forces: controlling a forecasted $100 trillion of which China owns 70% **12:45** - Networking Lunch, Audience with a Keynote and SEE LINE-UP BELOW for Boutique/ Emerging Manager Selection Workshops & Showcases
13:00									

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14:00			**14:00** - Building the next gen investment process and making it relevant: New leaders in behavioural quantimental & machine learning in wealth management	**14:00** - Changes in front end distribution models and the battle for asset allocation: Post Mifid 2 the world is moving fast towards discretionary and model portfolios, what are the new business models, distribution dynamics and partnership opportunities for third party funds? Plus Sli.do Survey **14:30** - What will the private bank of the future look like?			**14:00** - New asset allocation in the great market reset: what are the new asset classes and new asset allocation tools in a period of volatility **14:30** - Where to find consistent returns with active alpha: How to blend stock-pickers and growth – what are going to be the high conviction investment themes are set to deliver stellar returns in the next decade?	**14:00** - (Even More) Disruption in the back office: Latest market trends in emerging and developing tech **14:35** - How to be smart about Intelligent Automation: Driving the desired benefits and calculating the impact on ROI	**14:00** - The phenomenal and necessary growth in global green finance – Opportunities and challenges for issuers, lenders, asset managers and governments

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15:00			**15:00** - Quant and the new Algorithmic trading: How the arrival of data is transforming trading at warp speed and what this means for your business - and wider market stability	**15:00** - Are pension investors losing out on returns from private and illiquid markets? How can we create access to private markets for retail investors through intermediaries? **15:30** - Institutional sub-advisory mandates: Development of partnerships and discretionary subadvisory			**15:00** - Innovation in unit-linked insurance solutions: A revolution in markets where insurance has been the primary savings vehicle - France, Germany and Italy **15:30** - Everything you always wanted to know about IBOR* but were afraid to ask	**15:00** - True transparency in the fund distribution chain: Myth or reality? **15:30** - Innovations in platform-based solutions from across the ecosystem: Finding efficiencies, increasing transparency, cutting costs and improving client experience	**15:00** - ESG in Illiquid infrastructure investing blending public and private markets: Best practice Scandinavian active stewardship in aligning the investment value chain into the portfolio - how to manage investors innate short-termism **15:30** - From ESG & SRI to Impact Investing, from liquid to non-liquid investments - a snap shot of what leading family offices across Europe really want!

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16:00	**16:00** - Afternoon Coffee & Networking Break	**16:00** - Afternoon Coffee & Networking Break	**16:00** - Afternoon Coffee & Networking Break **16:30** - Next generation digital assets and tokenisation in financial services: Exploring new trading models linking the customer-driven meta-system together of payments, insurance and investments.	**16:00** - Afternoon Coffee & Networking Break **16:30** - Client Experience - the last battleground. Delivering clients 'service alpha'	**16:00** - Afternoon Coffee & Networking Break	**16:00** - Afternoon Coffee & Networking Break	**16:00** - Afternoon Coffee & Networking Break	**16:00** - Afternoon Coffee & Networking Break **16:30** - Deloitte Survey: Future Asset Management strategy across distribution, product development, regulation – and what are the asset servicing requirements to meet strategic objectives?	**16:00** - Afternoon Coffee & Networking Break **16:30** - Impact investment evolution- Building metrics, scale and pipeline in impact to maximise distribution
17:00			**17:00** - Blockchain innovations in making asset management inclusive and transparent: Next generation use cases from around the world	**17:05** - The evolving manager selection process – a new way forward from sophisticated investors and consultants		**17:35** - Day 1 Closing Keynote: From the global giants of technology VC to next gen digital leaders, what is going to be the most significant technological development of benefit to humanity in the next five years?			

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18:00	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)	**18:00** - FundForum International Day 1 Drinks Reception at The Tree House (on site at the Bella Centre)

APFI Breakfast -Global Developments in Fund Buying from Allocators in America, Europe, Africa, and Beyond ETFs and Active ETFs in the Portfolio

07:45 - 08:20
Asset Allocator Only

MIFID II, SEC approval of non-transparent ETFs, pension fund changes in Nigeria and South Africa, fee pressures, market consolidation and the rise of robo-advisors. Listen to APFI allocators from America, Africa, England, Sweden, Iberia, Italy and more as they provide their views on the changes affecting professional fund buyers and manager selectors worldwide.

Participants

Speaker: Chetan Modi - Co-founder and Managing Director, 360 Fund Insight

Speaker: Adam Choppin - Manager Research – International Equities, FIS Group, Inc.

Speaker: Jauri Häkkä - Managing Director, Widhaby Advisors

DISTRIBUTION SPECIAL FOCUS Global Distribution – Trends, challenges and solutions for keeping your place in a highly competitive industry

07:45 - 08:20
Distribution - Auditorium 10 & 11, 1st Floor

Whether the challenges are political, macro-economic or regulatory – asset managers have to adapt to keep their place in a highly competitive industry. Join us to explore the global, regional and country specific challenges asset managers face in 2019 and beyond. In this session we will explore distribution and sales flow trends in Europe, the United States and Asia-Pacific and set out to answer the following: What can European asset managers learn from across the USA? Is Asia a growth opportunity for your firm? Why isn't your fund on a buy list or in a model portfolio?

Participants

Presenter: Alastair Wainwright - Senior Consultant, Global Research, Strategic Insight, an ISS Business

Presenter: Karen Duncan-Jones - Market Metrics' Senior Associate, Strategic Insight, an ISS Business

Registration & Welcome Coffee

08:00 - 08:30
For Everyone

Welcome Day 2 from FundForum International

08:30 - 08:35
Global Megatrends - Auditorium 10 & 11, 1st Floor

Chairman's Welcome

08:35 - 08:40
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Chairman: Daron Pearce - CEO, BNY Mellon EMEA Asset Servicing

What next for globalisation? From trade wars, escalating climate-crisis to the populist backlash – how to manage risk when it is not global business as usual?

08:40 - 09:15
Global Megatrends - Auditorium 10 & 11, 1st Floor

How do we build resilience in managing volatility and risk as global trade falters, world economic growth slows and geopolitical tensions and populism continue to rise and Central Banks warn the financial sector that they cannot ignore climate dangers from extreme weather and its stakes in polluting firms.

Global macro risk management: Navigating performance & extreme political risk as globalisation spins in reverse and national forces come to the forefront

How deep and long is the downturn going to be? What's coming next as globalisation spins in reverse and national forces come to the forefront. US, Italy, Brexit, Russia and France. How should asset managers insulate portfolios/performance from the vagaries of sovereign political and financial risk scenarios? Is there such as thing as a low risk portfolio?

According to the WEF we need to prepare for the next crisis. Many vulnerabilities still exist – the good times have not been used as productively as they might to address these issues, leaving the global economy exposed to the next cyclical downturn. Regional challenges vary, but most intriguing is that unemployment was identified in the report as the single biggest risk on a global basis. Clearly the combination of glacial wage growth, automation and outsourcing have eroded worker morale and helped fuel populism. Income inequality remains a key concern in most regions and needs to be addressed more comprehensively to help bolster economic and social resilience.

Fiscal crises' was also ranked among the top five risks of highest concern globally, with many regions highlighting it as a pertinent threat. This relates to the pressing issue of excessive debt. Global indebtedness at the household, corporate and government levels continue to rise, and dependencies within the financial system have not been addressed.

Participants

Moderator: Rochelle Shelly Antoniewicz - Senior Director, Industry and Financial Analysis, ICI Global

Speaker: Robert Horrocks, PhD - Chief Investment Officer, Portfolio Manager, Matthews Asia

Speaker: Stuart Thomson - Senior Strategist, Manulife Investment Management

Speaker: Fiona Frick - Group CEO, Unigestion

Speaker: John Emerson - Former US Ambassador to Germany (ret.), Global Relationship Manager & Vice Chairman, Capital Group International, Inc

Asia/China Insight 2020: Is growth really over? Where to invest for the future

09:15 - 09:45
Global Megatrends - Auditorium 10 & 11, 1st Floor

Surfacing prospects in the light of OBOR and the growth prospects in the world's largest demographics for middle class GenZ and Millenials

Participants

Moderator: Sherry Madera - Chief Industry & Government Affairs Officer, Refinitiv

Speaker: Linda Li - Managing Director, Partner, Vickers Venture Partners

Speaker: Simon Hopkins - CEO, MILLTRUST INTERNATIONAL GROUP & Director, One Belt One Road Fund (CSOBOR),, CITIC Securities

Speaker: Mike Wittich - Greater China & North Asia Head, Investor Coverage, Standard Chartered Bank

How to deliver growth for savers today and protect values for our future? What do asset owners and investors want from asset managers as we move towards a new framework for investing for both for short term financial return and long term, low carbon economy

09:45 - 10:15
Global Megatrends - Auditorium 10 & 11, 1st Floor

Insights from some of the world's most influential asset owners and pension consultants on rethinking how can public trust, growth and sustainability be compatible

One of the major factors holding back action to address climate change in the financial industry is a recognition that there is a values-based element at play. The mathematical models that produce the optimal investment decisions that have limited the consideration of ethical values in finance also limit the potential for change until it can be empirically proven. Even where these data may exist to support values-based finance, they often struggle to capture the attention of the mainstream because there is an internal bias towards incrementalism within finance that constrains action.

The movement towards change has been systematized in the Sustainable Development Goals and the pace of change is only likely to hasten as businesses and governments buy in. They will also be reflected in finance, whether the bankers and asset managers wish them to be, and the advantage will go to those who anticipate rather than those who react.

Participants

Moderator: Ileana Sodani - Managing Director, BNY Mellon

Speaker: Jan Rasmussen - Head of ESG, PensionDanmark

Speaker: Pete Drewienkiewicz - CIO, Global Assets, Redington

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

Why we need to lead the way in finding and managing sustainable growth? How leading asset managers are pivoting global products and portfolios with new approaches to stewardship and strategies for managing portfolio volatility vs value

10:15 - 10:45
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Troy Mortimer - Head of Sustainability and Responsible Investment, KPMG

Speaker: Nils Bolmstrand - CEO, Nordea Asset Management

Speaker: Evy Hambro - Global Head of Thematic and Sector Investing, Blackrock

Speaker: Scott Nisbet - Partner, Client Service Director, Baillie Gifford

SESSIONS

MAIN CONFERENCE DAY TWO - 2020 AGENDA COMING SOON - 26/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp

10:45 - 11:30

10.55 – 11.20– Data & Next Gen Asset Management Exhibition stage

10.55 -11.10 Introducing the FundForum Next Gen Leaders' Voices Bootcamp: How to turn fear in to excitement, anxiety into ambition - and reluctance into positivity.

Hear why speaking up and finding your voice boosts your leadership skills, professional profile - and helps plug the opportunity and pay gap. Skill up and take responsibility for your professional development. Having a voice gives you choice. An introduction to a bootcamp in two acts: **1. Almost Stage Ready** – During the day, ten next gen leaders take part in an afternoon workshop with Leadership and Public Speaking Coach, Alison Campbell which will provide you with a fool proof process which will make public speaking something you begin to relish as confidence and ability grows. **2.** They will present at the Next Gen Voices showcase later today at 16.30

moderator - Jenny Adams, Editor in Chief, FUNDFORUM INTERNATIONAL

With Alison Campbell, LEADERSHIP & LIFE STRATEGY COACH with IFF Training, An Informa PLC Business

Manuela Fröhlich, Co-Founder, FONDS FRAUEN

Kate Webber, Co Founder, WOMEN IN ASSET SERVICING

11.10 - 11.20 Hear from the winners of the first FundForum Voices Outreach Programme in association with Women in asset servicing (WIAS). Hear these ambassadors talk about their experience of the Almost Stage Ready Programme - what they hoped to achieve, what skills they learned and how it enabled them to think differently

Elizabeth Gill, Sales Executive, CRUX ASSET MANAGEMENT

India Clegg, Senior Business Consultant, BRAVURA SOLUTIONS

Laura Bampfylde, Senior Manager, Product Development, HSBC GLOBAL ASSET MANAGEMENT

Sascha Calisan, Head, Fund Distribution Support, NORTHERN TRUST

What is the Almost Stage Ready Pitch Camp?

Find your industry voice and plug that opportunity gap by taking responsibility for your professional development.

The workshop will provide you with a fool proof process which will make public speaking something you begin to look forward to.

You can choose any topic you like. Public speaking is always best delivered about a topic you know really well, allowing you to use real life experiences which give emotional impact.

You really do not need to prepare anything apart from having a topic in mind, it can be business or personal, but should be something you are passionate about.

Hear the personal experiences of our three ambassadors who have gone through the programme to rowsing success.

Participants

Moderator: Jenny Adams - Global Executive Producer, FundForum International

Speaker: Alison Campbell - Public speaking coach and mentor, Alison Campbell Associates

Speaker: Manuela Fröhlich - Global Head of Business Development at LRI Invest S.A. & Co-founder, Fondsfrauen

Speaker: Kate Webber - MD, Head of Product Development, Calastone

Speaker: India Clegg - Co-Winner FundForum Next Gen Leaders' Voices Programme, Bravura Solutions

Speaker: Laura Bampfylde - Co-Winner FundForum Next Gen Leaders' Voices Programme, HSBC Asset Management

Speaker: Elizabeth Gill - Co -Winner FundForum Next Gen Leaders' Voices Programme, Crux Asset Management

Speaker: Sascha Calisan - Head, Fund Distribution Support, Northern Trust

Staying relevant 1: Why the next big challenge is not tech but people – what are the new rules of the culture and talent wars 2020 that will determine competitive advantage - and how can you retain your ability to stay relevant?

11:30 - 12:00
Distribution - Auditorium 10 & 11, 1st Floor

How AI and the development of emerging talent will determine competitive advantage in the future as the value of brand declines - how are different organisations thinking about their talent acquisition and retention pipelines and strategies?

Participants

Moderator: Malik Sarwar - CEO, K2 Leaders

Speaker: Brian Byrne - CEO, Futurist, War-Gamer, Aviador Group

Speaker: Kathryn Koch - Managing Director, Co-Head of Fundamental Equity – New York, Goldman Sachs Asset Management (GSAM)

Speaker: Jan-Marc Fergg - Global Head Wealth Products & Services, Insights, HSBC RBWM

Fund Buyer Solutions Day 2

11:30 - 13:00
Investment - Room 173, 1st Floor

A showcase of top performing funds in front of an audience exclusively of buyers

Each fund manager has 10 minutes to present their fund, followed by 5 minutes moderated Q&A to the room at large. A round up Q&A is also added.

Fund Buyer Solution 1: Applying 3 decades of multi factor stock selection expertise to a dedicated ESG investment universe
Thorsten Paarmann, Member of the Portfolio Management Team, **INVESCO**

Fund Buyer Solution 2: US
William Smead, CEO & CIO**, SMEAD CAPITAL**

Fund Buyer Solution 3
Neal Capecci, Managing Director, Portfolio Manager of the Asian Bond Absolute Return Fund, **MANULIFE INVESTMENT MANAGEMENT**

Fund Buyer Solution 4
Derek Fulton, CEO, **FIRST TRUST**

Fund Buyer Solution 5
Rens Ramaekers, Portfolio Manager ABS, Mortgages & Consumer Loans, **AEGON ASSET MANAGEMENT**

Open Q&A

Participants

Moderator: Maria Simon - VP, Client Success, eVestment

Presenter: Thorsten Paarmann - Portfolio Manager of Invesco Pan European Structured Responsible Equity Fund, Invesco

Presenter: William Smead - Chief Executive Officer/ Chief Investment Officer, Smead Capital Management

Presenter: Neal Capecci - Managing Director, Portfolio Manager of the Asian Bond Absolute Return Fund, Manulife Investment Management

Presenter: Rens Ramaekers - Portfolio Manager ABS, Mortgages & Consumer Loans, Aegon Asset Management

Presenter: Derek Fulton - Director & CEO, FTGP

Smart Market Intelligence vs Wisdom of the Crowd 1: Emerging & frontier markets - from geo-political risk to under-appreciated geo-economic opportunities what is the macro outlook through an emerging market lens?

11:30 - 12:00
Smart Market Intelligence - Room 181, 1st Floor

What's not priced into the geopolitical and geo-economic assessment of emerging and frontier markets?

11.30-11.40 Research Briefing: where are the Top 10 frontier markets of tomorrow - and why?

Gavin Serkin, Founder and Managing Editor, **FRONTIER FUNDS MEDIA & INTELLIGENCE** former Head Emerging Markets Desk, **BLOOMBERG**

11.40-12.00 Fund Buyers and leading commentators discussion

Fund Buyers & commentators discussion: portfolio risk: specific challenges and opportunities of interpreting the political and economic risks in emerging and frontier markets from Africa to the Middle East, Asia and LATAM.

Participants

Presenter: Gavin Serkin - Author of Frontier (Bloomberg) - FT "must read" - & Founder and Managing Editor, New Markets Media & Intelligence

Speaker: Manuela Cedarmas - Senior PM, Head of Emerging and Frontier Markets, Tages Capital

Speaker: Ian Beattie - Co-Chief Investment Officer, Executive Director, NS Partners

Speaker: Basim Al-Ahmadi - Co-Founder, Global Risk Insights

Leaders Panel: The asset manager of tomorrow - View from the back office

11:30 - 12:00
Operations - Room 180, 1st Floor

What are the pressures driving operating model transformation? What can we predict about how these will evolve? What impact will emerging asset classes have as they become more widespread? How can we develop infrastructure, IT platforms and delivery mechanisms to support future business needs?

Participants

Moderator: Rachel Turner - Head of EMEA Investment Manager & Insurance, BNY Mellon

Marion Mulvey - Co-CAO and Head of Asset Management Operations, EMEA, JP Morgan Asset Management

Dirk Buggenhout - Head of Operations, NN Investment Partners

Laurence Leblond - Chief Operating Officer, Syz Asset Management

Jan Grunow - Head of Investment Operations, Swiss Life Asset Management

Wealth management 2.0 Discussions Part 1 – Catch The Wave In NextGen Wealth: Trends and challenges for engaging the next generation's wealth transfer

11:30 - 12:15
Data and Building Next Gen Asset Management - Exhibition Stage

Wealth transfer/creation and what this means for incumbent businesses – how can brands leverage digital?

With the $42million transfer underway, and millennials starting up businesses at an accelerating rate, think that your existing wealth management firm is equipped to keep these new investors?

Well, think again! Join April and Robin to discuss the Next-Gen preferences alongside the existing infrastructure and mindset of wealth firms to learn what you can do to "catch the wave" of wealth.

Participants

Presenter: April Rudin - Founder and President, The Rudin Group

Presenter: Robin Kiera - sparring partner for digital products and attention hacking, Digital Scouting

Staying relevant 2: Innovations at the customer front line of financial advice and wellbeing - what does this mean for wealth management platforms and asset managers

12:00 - 12:30
Distribution - Auditorium 10 & 11, 1st Floor

12.00-12.10 New research on the voice of the end customer: What is the value of asset management in the eyes of the people paying for it? How new mandated value reporting will bring TripAdvisor to the investment industry

As the regulator moves to mandate value assessments in the UK, consideration of the topic is no longer optional in any EU country. But how to work out this most subjective of things? Holly will share new research conducted with over 2,000 fund investors to table what value is in the eyes of the people paying for it.

Holly Mackay, CEO, **BORING MONEY**

12.10-12.30 Panel Discussion - The future of financial advice and financial well-being: front line innovations models

Discussion Moderated by

Chris Newlands, Editor, **FINANCIAL NEWS**

With

Platform model of the future – where the lines between advised and direct are blurred

Jackie Boylan, Head of UK Adviser Platform, **FIDELITY**

Sam Seaton, CEO, **MONEYHUB**

Holly Mackay, CEO, **BORING MONEY**

Participants

Presenter: Holly Mackay - Founder and CEO, Boring Money

Moderator: Jenny Adams - Global Executive Producer, FundForum International

Speaker: Jackie Boylan - Head of UK Adviser Platform, Fidelity International

Speaker: Samantha Seaton - CEO, MoneyHub

SESSIONS

MAIN CONFERENCE DAY TWO - 2020 AGENDA COMING SOON - 26/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

Emerging market regional experts spotlight: How it's different to invest through the lens of locals?

12:00 - 12:30
Smart Market Intelligence - Room 181, 1st Floor

Moderated by Adam Choppin, FIS

LATAM - Juan-Luis Rivera, CEO, MONEDA

ASIA - Emill Nguy, Chairman, Chief Investment Officer & Chief Executive Officer INCOME PARTNERS

CIS/RUSSIA - Alexander Branis, CIO, PROSPERITY CAPITAL MANAGEMENT

VIETNAM - Dominic Scriven, founder and Chairman, DRAGON CAPITAL

Participants

Moderator: Adam Choppin - Manager Research – International Equities, FIS Group, Inc.

Speaker: Juan Luis Rivera - Partner, Moneda Asset Management

Speaker: Emil Nguy - Chairman, Chief Investment Officer & Chief Executive Officer, Income Partners HK

Speaker: Dominic Scriven OBE - Founder and Chairman, Dragon Capital

Speaker: Alexander Branis - CIO, Prosperity Capital Management

The asset servicing infrastructure of tomorrow: What will the next generation of asset servicing look like and what demands will drive this?

12:00 - 12:10
Operations - Room 180, 1st Floor

How are new and developing asset classes effecting the model? What developments in fintech are revolutionising speed, accuracy and efficiency across the asset servicing lifecycle?

Participants

Paul Heffernan - Head of Cross Border Sales, Europe, HSBC Securities Services

The ecosystem of tomorrow: A look at the first data coming from the launch of the largest DLT infrastructure in financial institutions

12:10 - 12:30
Operations - Room 180, 1st Floor

Participants

Edward Glyn - Managing Director, Head of Global Markets, Calastone

Interviewer: Laura Bailey - Founder, Qadre

An exclusive insight into what it takes to launch a digital investment proposition at both a private and retail bank. This in conversation session will explore product development, branding and partnerships

12:15 - 12:45
Data and Building Next Gen Asset Management - Exhibition Stage

Participants

Presenter: Anthony Christodoulou - Founder, Robo Investing

Presenter: Jakob Nordentoft Beck Thomsen - SVP, Global Head of Customer Engagement, Wealth Management, Danske Bank

Presenter: Jan Kühne - Chief Digital Officer, M.M.Warburg & CO

Staying relevant 3: Briefing - How should the asset management business model evolve to address the structural shifts impacting the industry?

12:30 - 13:00
Distribution - Auditorium 10 & 11, 1st Floor

Good times have continued until recently, however these have masked some headwinds. Additionally, we are experiencing structural shifts which will drive us to an inflection point.

Asset managers need to take a twin track strategy to survive

12.30-12.40 Research Briefing
Alex Birkin, Partner, EMEIA Industry Leader and Global Advisory Leader - Wealth and Asset Management, **EY**

12.40-13.00 Fireside Chat: Innovations in customer focused fee structures

Participants

Presenter: Alex Birkin - Partner, EMEIA Industry Leader and Global Advisory Leader - Wealth and Asset Management, EY

Speaker: Peter Kraus - Chairman and CEO, Aperture

Speaker: Mussie Kidane CFA - Global Head of Fund Selection, Banque Pictet & Cie

APFI emerging and boutique asset manager selection & business development workshop

12:30 - 13:00
Smart Market Intelligence - Room 181, 1st Floor

APFI fund buyers from around the world and leading emerging market boutiques

Moderated by Adam Choppin, Analyst, Manager Research & Investment Strategy, FIS GROUP USA

Gandy Gandidzanwa, Managing Director, Chairman CONCEPTUAL FUND MANAGERS,

Riad Daniels, Investment manager research and analytics, GTC

Mark Martyrossian, CEO, AUBREY CAPITAL MANAGEMENT

Ping Zhou CEO & CIO, BIN YUAN CAPITAL

Robert Beauregard, CEO & CIO, GLOBAL ALPHA CAPITAL

Participants

Moderator: Adam Choppin - Manager Research – International Equities, FIS Group, Inc.

Speaker: Gandy Gandidzanwa - Managing Director and Chairman, Conceptual Fund Managers

Speaker: Riad Daniels - Investment manager research and analytics, GTC

Speaker: Mark Martyrossian - CEO, Aubrey Capital Management

Speaker: Ping Zhou - CEO, Bin Yuan Capital

Speaker: Robert Beauregard - President & CIO, Global Alpha Capital

Debunking myths and misconceptions: Analysis of the impact of ETFs in the investment ecosystem

12:30 - 13:00
Operations - Room 180, 1st Floor

ETFs have been seen as a challenger to the traditional mutual fund industry, bringing in new technology and easy accessibility with lower costs. However ETF is a technology, a new distribution channel and one that can be utilised by almost any mutual fund product today. The question to mutual funds managers is whether the can learn from the success of the ETFs and reap their benefits by incorporating them in their business model or choose to ignore them?

Participants

Moderator: Robert Rushe - Head of ETF Services, EMEA, BNY Mellon

Speaker: Jaspal Sagger - Managing Director, Head of International Product, Legg Mason

Speaker: Nick King - Head of ETFs, Fidelity International

Speaker: Stephan Pouyat - Global Head of Capital Markets, and Funds and ETF Services, Euroclear

The Wealth Management 2.0 Discussions Part 3 - Who will get the affluent in Europe and the US: Bank or Insurer?

12:45 - 13:00
Data and Building Next Gen Asset Management - Exhibition Stage

Hear from two of the most recognised experts in digital wealth management from either side of the Atlantic comparing the evolution of digital wealth management in Europe and the US

- Digitalization commitment or business as usual?

- Use Cases from both ecosystems focusing on successful products, partnerships and services

- how are the incumbents thinking about the future in both ecosystems?

- would you be on the side of the bankers or on the insurance sales men? In the end would we agree that both industries have the good, the bad and the ugly and in the end the best of both industries might win - and that it might be a good idea to join forces and to think in unusual alliances.

April Rudin, President, THE RUDIN GROUP

Robin Kiera PhD DIGITAL SCOUTING

Participants

Presenter: April Rudin - Founder and President, The Rudin Group

Presenter: Robin Kiera - sparring partner for digital products and attention hacking, Digital Scouting

Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2

13:00 - 14:15

Lunchtime progamme on the Data & Next Gen Leadership Stage

13.15–13.40 Danish Deep Tech Alliance Part 1 - HealthTech
Innovation Showcase of some of the most interesting entrepreneurs and new tech start ups on the Danish scene Moderated by **Camilla Gilbro,** Programme Manager, **DEEP TECH ALLIANCE**

- **Lise Pape,** Founder, **WALKWITHPATH** – PROBLEM how to make it easier for people with difficult balance (Parkinson, after a stroke, etc.) to walk safely SOLUTION a device on your shoe with a laser that “lights a path”
- **Marie Lommer Bagger**, Founder & CEO, **MEASURELET** - PROBLEM How to separate and measure patient output.… SOLUTION a med-tech solution for intelligent toilets for hospitals
- **Hanne Jarmer**, CEO & Founder, **GODOGO –** PROBLEM – How to keep your best friend mentally healthy. SOLUTION - training systems for dogs via TV and AI device…

Participants

Moderator: Camilla Gilbro - Project Manager, Deep Tech Alliance

Presenter: Marie Lommer Bagger - CEO & Founder, Nurse, MSc, Measurelet

Presenter: Lise Pape - CEO and Founder, WalkWithPath

Presenter: Hanne Jarmer - CEO & Founder, Go Dogo

Nordic fund selectors - managing the asset manager / selector relationship for mutual benefit

14:15 - 14:45
Distribution - Auditorium 10 & 11, 1st Floor

1. Evaluating culture in asset manager organisations as part of the fund selection process

“Culture” is difficult to pinpoint, but is an important factor for all organisations – how could selectors evaluate this as part of the selection process?

2. Improving the relationship between sales teams and selectors

An increasing number of asset manager sales people are keen to set up meetings and selectors have to manage their time. How do we solve this to the benefit of both sides?

Participants

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

Speaker: Mia Söderberg - Senior Portfolio Manager in Alternative Investments & Manager Selection, Nykredit Asset Management

Speaker: Per Lindgren - Head of Manager Selection, Skandia Liv Asset Management

Speaker: Allan Møller - Head of Fund Selection , Danske Capital Wealth Management

Speaker: Georg Skare Lund - Head of Fund Selection , STOREBRAND ASSET MANAGEMENT

Speaker: Karolina Qvarnstrom - Product Development Manager & Manager Selection, Länsförsäkringar Fondförvaltning AB

Alternative risk praemia solutions in the portfolio: How to think about liquidity and volatility

14:15 - 14:45
Investment - Room 173, 1st Floor

Participants

Moderator: Amy Bensted - Head of Hedge Fund Products, Preqin

Speaker: Michaël Régy - Director - Selection of Third Party Funds of Hedge Funds, Bank of America Merrill Lynch

Speaker: Andrew Harradine - Head of Mutual Fund Research, EFG Asset Management

Speaker: Francois Oustry - Head of Quantitative Strategies & Innovation, Millennium Global

Speaker: Bjarne Graven Larsen - Founder & CEO, Qblue Capital

Bill Kelly - CEO, CAIA Association

Smart market intelligence vs wisdom of the crowd 3: So what's next in fixed income and sovereign markets and what is the changing role of data intelligence?

14:15 - 14:45
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Simone Vroegop - Head of European Product Management, BBH

Speaker: Jonathon Orr - Fixed Income Portfolio Manager, Goldman Sachs Asset Management

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

Evaluating regulatory impact: Strategic approaches for a global operating model

14:15 - 14:45
Operations - Room 180, 1st Floor

- Planning for new challenges; SFTR (EU), MMFR (EU), Cost disclosure regimes (Global) and SM&CR (UK)
- Handling multiple geo-disparate requirements; Substantial shareholding, Sensitive industries and position limits
- Maintaining coherent regulatory intelligence and technology/operation strategies

Participants

Moderator: Ronan Brennan - Chief Product Officer, Compliance Solutions Strategies

Mette Duffy - Legal Consultant, PFA Asset Management

Mr Vikramaaditya - Chief Transformation & Administration Officer, HSBC Global Asset Management

Alan Picone - Partner, Asset Management Risk Advisory, KPMG Luxembourg

Comparing global progress in retail and financial inclusion: How is digital innovation enabling the building of reliable long-term pensions, savings and low-cost investment solutions?

14:15 - 14:45
Data and Building Next Gen Asset Management - Exhibition Stage

14.15-14.25 - A Global retirement savings assessment from China, Australasia, Europe and North America on how savers use technology.

Anna Driggs, Director and Associate Chief Counsel, Global Funds Policy, ICI

14.25-14.30 - Case Study- Lessons for asset managers and robo advisors from the Australian Commission Review
Implications fund that fees charged to clients must reflect a relevant service and that regulation of robo advice is the same as for human advice. In light of the impending senior manager's personal responsibilities and Mifid II investment manufacturers' suitability obligations those offering robo advice need to tread cautiously.

14.30-14.45 - Panel Discussion

Participants

Moderator: Anna Driggs - Director and Associate Chief Counsel, Global Funds Policy, ICI Global

Speaker: James Richardson - Head, WealthPilot, Brewin Dolphin

Speaker: Samantha Seaton - CEO, MoneyHub

Nordic Institutional Investors in the spotlight: indepth investment strategy and challenges

14:45 - 15:15
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Caroline Liinanki - Editor, Nordic Fund Selection Journal, Tell Media

Speaker: Anders Svennesen - CIO, Danica Pension & Danske Bank Asset Management

Speaker: Niklas Ekvall - Chief Executive Officer, Fourth Swedish National Pension Fund (AP4)

Speaker: Henrik Olejasz Larsen - CIO, Sampension

The new multi-asset institutional solutions portfolio: Which approaches have proved resilient in the downturn and why?

14:45 - 15:15
Investment - Room 173, 1st Floor

Participants

Moderator: Bill Gourlay - Global Head of Investment Product Development, Aon

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

Speaker: Stephen Crocombe - Head of Client Portfolio Solutions EMEA, BlackRock

Speaker: Bernard Aybran - CIO of Multi-Management, Invesco

Smart market intelligence vs wisdom of the crowd 4: New developments in alternative credit from the first digital securitisation of SME loans to ABS – how the global debt market works with APIs and enables the diversification and broadening of investor pool

14:45 - 15:15
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Furio Pietribiasi - Managing Director, Mediolanum Asset Management

Speaker: Daniel Bartsch - Founding Partner and Member of the Executive Board, creditshelf AG

Speaker: Pedro Carvalheiro - Head of Markets and Investments, Banco BNI Europa

Speaker: Francesco Filia - CEO, Fasanara Capital

Speaker: Oliver Schimek - CEO, Crosslend

Are COOs leaving money on the table?

14:45 - 15:15
Operations - Room 180, 1st Floor

- 18 months on from MiFID II: How are global markets adapting to an unbundled world? What are the pressures facing asset managers?
- How are asset managers dealing with the implications of MiFID II? How are they managing research payments? How is transparency around execution evolving in response?
- Is outsourcing a consideration? Is the outsourcing value chain expanding from the back and middle-office to the front-office?
- How does research work now? How are investment banks pricing their research? What are asset managers paying? Are research exchanges and aggregators the new paradigm?
- What changes have been made? Is better data leading to improved decision-making? How are COOs and operations teams responding? What were their plans at the end of 2017 versus the outlook now?

Participants

Moderator: Richard Day - Chief Operating Officer, MontLake

Gerard Walsh - Head of Development, Institutional Brokerage, Northern Trust Capital Markets

Greg Faragher-Thomas - Director, Alpha Financial Markets Consulting

Karen Zachary - COO, CRUX Asset Management

Open banking and APIs: New thinking about how we can build a behavioural savings system that overcomes complexity and works for everyone

14:45 - 15:15
Data and Building Next Gen Asset Management - Exhibition Stage

14.45-14.55 **New Research Briefing**
Greg B. Davies, OXFORD RISK

14.55-15.15 **Panel Discussion**

For an activity that on the surface appears simple, determining exactly how best to save can be bewilderingly complex. Savers have to trade-off immediate consumption with the benefits of consumption later; they need to juggle saving for short-term needs, mid-term goals, and long-term retirement; they need to figure out whether to channel any savings into reducing debt, savings, investments, or insurance; and they have to navigate a thicket of possible products, tax containers, and incentives. In short, they have to understand and interact with an entire ecosystem of possibilities in order to determine the right actions to take.

Humans dislike complexity. One response is to avoid complex issues altogether, leaving the problem to resolve itself, or putting it off to later. Thus, faced with the daunting problem of how to juggle immediate, mediumterm, and long-term savings needs, many people simply ignore all of them, putting off savings until later. Not knowing how to allocate savings between paying down debt, saving for the rainy day, the holiday, or retirement (or whether to place savings into a current account, savings account, an ISA, pension, or any of the other many savings containers on offer) can nudge potential savers to side-step the whole issue, and be spenders instead.

Another human response to complexity is to compartmentalise, dividing the big problem into a number of smaller, more manageable problems. We use mental accounts to simplify decision making; and we often use real manifestations of these accounts in our financial systems, thus focussing on only one need at a time (the 'jam jars' or accounts for the holiday, or the car, or kids' school fees). This is also how policy makers and the financial services industry have tended to approach the problem of encouraging people to save more: to simplify the problem by focussing on one aspect of the overall ecosystem at a time.

As a result, we have a wide range of interventions that have been shown to lead to greater savings … inside the bounds of the experiment. But the recent MAS Savings Evidence Review reveals that there is surprisingly little evidence that any of these well-intentioned designs actually increase net savings rather than just induce savers to shuffle money around without increasing their overall financial wellbeing or resilience. Some of these interventions may actually make the problem worse: firstly, because adding yet another option into the ecosystem increases, not decreases, complexity. Secondly, if these programs are designed in isolation from understanding the overall ecosystem they may lead to active harm elsewhere.

To overcome these problems of complexity and unintended consequences it is vital that the overall system of is designed as a coherent whole, rather than the piecemeal accumulation of isolated 'good ideas. This session explores these options

Participants

Presenter: Greg B. Davies PhD - Head of Behavioural Science, Oxford Risk

Speaker: Matthew Blakstad - Assistant Director, Insight unit, NEST - National Employment Savings Trust

Speaker: Scott Condron - Managing Director, Blackrock

Speaker: Samantha Seaton - CEO, MoneyHub

Spotlight on German Institutional Investors: How to run client's money with new challenges to fiduciary duty

15:15 - 15:45
Distribution - Auditorium 10 & 11, 1st Floor

Asking professional decision makers on implementing new objectives with new metrics and different yardsticks.

Participants

Moderator: Dr Oliver Roll - Founding Partner, 4AlphaDrivers

Maria Leitzbach - Head of Portfolio Management, SOKA BAU

Joachim Köhne - Head of Asset Management , Hamburger Sparkasse AG

Doris Maerzluft - Director of Portfolio Management, Deutsche Oppenheim Family Office

Passive core and active blending: Best practice fund selection and portfolio construction – new thought-leadership on core and satellite to smooth volatility

15:15 - 16:15
Investment - Room 173, 1st Floor

15.15-15.25 Research Briefing - A new asset allocation perspective on blending passive and active
Brian Ahrens, PGIM

15.25-15.55 Panel Discussion

15.55-16.15 Open Q&A with Sli.do

Participants

Moderator: Tom Beal - Deputy Chief Investment Officer, St James's Place Wealth Management

Presenter: Brian Ahrens - Executive Vice President, Strategic Investment Research Group, PGIM

Speaker: Yanwu Guo - Head of Quantitative Analysis, Investment Research, Allfunds Bank

Speaker: Ursula Marchioni - Managing Director - Head of Portfolio Analysis and Solutions, EMEA, Blackrock

An audience with a leading China Strategist – understanding the changing political forces in China and the implications for the direction of the domestic socio-economic agenda

15:15 - 15:45
Smart Market Intelligence - Room 181, 1st Floor

Participants

Presenter: Andy Rothman - Investment Strategist, Matthews Asia

Why training the organisation and not just the data team is vital

15:15 - 15:45
Operations - Room 180, 1st Floor

Is everyone in your organisation equipped to take advantage of data? Can they spot the value hiding inside the data?

Participants

Phil Yeoman - Head of Data Governance, The Pensions Regulator

AdvisorTech and Robo 2.0 – Putting next gen wealth management into practice: How are customers selecting investment propositions and engage with investments digitally across UK and Continental Europe?

15:15 - 15:45
Data and Building Next Gen Asset Management - Exhibition Stage

The objective of this panel is to give the audience a truly European overview on the state of Robo-advice in Europe and how Asset Managers, traditional IFAs and retail banks are approaching digitalization in the fund distribution domain, to see what will the advisory business of the future look and feel like...

Participants

Moderator: Fabrizio Zumbo - Associate Director - European Asset Management Research, Cerulli Associates

Speaker: Klaus Thaler - CEO, ELVIA e-invest AG

Speaker: Giorgio Semenzato - CEO and Co-Founder, Finizens

Speaker: Geoffroy de Schrevel - CEO, Gambit Financial Solutions & Birdee

Speaker: Fabian Knigge - Head of Investment, Ginmon

What you always wanted to ask… DACH-region top-tier wholesale-selectors: The global crowd sourced question session

15:45 - 16:15
Distribution - Auditorium 10 & 11, 1st Floor

Participants

Moderator: Simon Weiler - Head of Research & Editor, e-fundresearch.com Data GmbH & investRFP.com

Speaker: Eva Polly - Head of Manager Selection, Raiffeisen Capital Management

Speaker: Michael Simmeth - Head of Manager Selection, LGT Capital Partners

Speaker: Rene Penzler - Director, Co-Head Multi Strategy, Pension solutions, DWS Group

Smart Market Intelligence meets the Wisdom of The Crowd 5: The future of Europe – From the implications of the rise of Chinese investment to the ascendance of the right, how is Europe succeeding in addressing the big geopolitical questions of its time?

15:45 - 16:15
Smart Market Intelligence - Room 181, 1st Floor

We consider three articles by leading thinkers looking at Europe

1. 3 Versions of Europe Are Collapsing at the Same Time- Post-1945, post-1968, and post-1989 Europe are all different — and none of them make sense anymore.

from article by Ivan Krastev in "Foreign Policy "

The first Europe, postwar Europe, is failing because memory of the war is fading and because it has contributed to a Europe incapable of defending itself. The second Europe, post-1968 Europe, is failing because it was the Europe of minorities; it's still trying to find a way to address majorities' demand that their cultural rights should be protected, too, without turning democracy into instruments of exclusion. The refugee crisis was Europe's 9/11. In the way 9/11 pushed Americans to change the lens through which they see the world America has made, the migration crisis forced Europeans to question some of the critical assumptions of their previous attitudes toward globalization. Post-1989 Europe is failing because Eastern Europeans no longer want to imitate the West and be judged by the West but rather want to build a counter-model.

Do Europe's failures mean that Europe is irrevocably falling apart? Fatalism would be a mistake. It does mean that Europe should invest in its military capabilities and stop taking America's security guarantees for granted. It also means that, in the same way European liberal democracies in 1970s and 1980s succeed at deradicalizing the far-left and integrating some of its legitimate demands in the mainstream, it should do the same with the far-right. And when it comes to West-East relations in Europe, the challenge is to find a way to strongly criticize the authoritarian turn in the East without insisting that imitating the West is the only meaning of democracy or naively imagining that a commitment to democracy can be bought with cohesion funds from Brussels.

2. Thomas Piketty - Manifesto for Europe - how to reduce inequality inside countries, not between them. Since the election of anti-European governments across the EU, and with Brexit looming, it is no longer possible to continue as before. We cannot simply wait for the next departures, or further dismantling without making fundamental changes to present-day Europe.Our continent is caught between political movements whose programme is confined to hunting down foreigners and refugees, on one hand, and on the other those who claim to be European but in reality continue to consider that hardcore liberalism and the spread of competition are enough to define a political project. They don't recognise that this lack of social ambition is what leads to feelings of abandonment.

Europe must build a new model to ensure the fair development of its citizens.

3 PIETER JUDSON Hapsburg Empire A New History

Participants

Moderator: Sara Sjølin - financial journalist, Berlingske Business

Speaker: Karim Chedid - Investment Strategist for ETFs and Index Investments (EII), Blackrock

Speaker: Simon Hopkins - CEO, MILLTRUST INTERNATIONAL GROUP & Director, One Belt One Road Fund (CSOBOR),, CITIC Securities

Speaker: Pierre Bollon - General Representative, AFG

Speaker: Adrian Whelan - Senior Vice President of Regulatory Intelligence, Brown Brothers Harriman

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Data as a differentiator: Strategies for supporting business growth and driving customer insights

15:45 - 16:15
Operations - Room 180, 1st Floor

15.45-15.50 Research Briefing - Howard Mannion, EY

15.50-16.15 Panel Discussion

Participants

Moderator: Phil Yeoman - Head of Data Governance, The Pensions Regeulator

Andreas Zubrod - Partner, Asset Management, KPMG in Germany

Howard Mannion - Partner, Financial Services, EY

Data-driven Ideas, ambition and talent networks in Chinese entrepreneurship: Next generation Chinese Venture Capital Showcase

15:45 - 16:15
Data and Building Next Gen Asset Management - Exhibition Stage

Introduced and Moderated by VC Angel Investor - Linda Li, Partner, VICKERS VENTURES

- What is the emerging trend in the entrepreneurship in China?
- Now China has more and more unicorn companies. Would those be blocking the future of the young start ups? How do entrepreneurs view this?
- How is female entrepreneurs/professional joining this mega trend to set up new economy?
- What is the ambition for Chinese entrepreneurs with regard to the global market?
- What is the biggest challenge in a start up in China today? (or maybe in their business)
- What would be your advice for European investors to enter China market if you believe the next 5~10 years is a good timing for investment?
- How to work with Chinese entrepreneurs?

Participants

Moderator: Linda Li - Managing Director, Partner, Vickers Venture Partners

Presenter: Cathy Xiaomeng Zhang - COO, Skyroam

Presenter: Zhen Li - Founder & CEO, MyTherapist

Presenter: Andrew Shewbart - Co-founder, Alo7.com

Afternoon Coffee & Networking Break

16:15 - 16:45

Fund distribution in private and retail banking networks in Europe

16:45 - 17:30
Distribution - Auditorium 10 & 11, 1st Floor

Traditional fund distribution in banking networks is facing headwinds: increased regulatory scrutiny, fee pressure, evolving client demands, etc. To remain competitive, banking networks have to redefine their value proposition for private and mass affluent clients. Product innovation is a key success factor in today's European fund distribution market and takes different forms: managed solutions, ESG and impact investing, private assets, thematic investments, etc.

The panel will discuss how to properly meet – or even exceed – client demand in an ever more challenging environment.

Participants

Moderator: Clémence Droin - Senior Project Manager, Indefi

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

Speaker: Alessandra Gaudio - MD and Global Chief Investment Officer, Swiss Life Banque Privée

Speaker: Daniele Spada - Head of Strategy and Development, Lyxor Asset Management

Speaker: Vincent Manuel - Chief Executive Officer and Chief Investment Officer, CA Indosuez Gestion

Geo-Economic Disrupters War-Game Trilogy Part 2- Wealth management transformed: "When Jung Met Arnold" – How neuro AI and carbon units ("Humans") will terminate first gen robo-advising. How has the game has played out in North America and what can we learn about managing and marketing in the digital era?

16:45 - 17:45
Smart Market Intelligence - Room 181, 1st Floor

Why AI profiling and scenario-based investment is the future---light-speed active management by quantum…the days of the human asset management are numbered!

So how do you embrace managing and marketing in the digital era?

The victors in the battle for client experience will be those who perfectly blend tech with human talent. Knowing which parts of the investing experience to delegate to automation and which to reserve for F2F interaction. Attention must be paid to the micro-climate of the Wealth client investing experience. Babbling robots or AI-enabled, prescient advisors? Automation or smart delegation (tasks to tech, client-care to humans)?

If Dreamworks Studio designed the wealth advisory experience of the future---what would it look and feel like? And what would Carl Jung tell us to do in order to deeply understand investing styles?

Participants

Presenter: Brian Byrne - CEO, Futurist, War-Gamer, Aviador Group

FundForum "Almost Stage Ready" Public Speaking Showcase - CLICK TO SEE THE LINE UP - Following our public speaking bootcamp, come and cheer a generation of new voices speak for 2 minutes on a personal passion

16:45 - 17:45
Data and Building Next Gen Asset Management - Exhibition Stage

Plugging the opportunity gap – get up and out of your comfort zone. Enabling a new pipeline of talent to find a powerful industry voice

The showcase line up will profile -

- **Cassie Berthoux, SEILERN INVEST**
- **Sandy Welthagen, INVESTEC**
- **Nicola Walthew, MANULIFE**
- **Charlotte Vermer, TOCQUEVILLE FINANCE**
- **Diana Sippel, PRINCIPAL GLOBAL INVESTORS**
- **Caroline Frelet-desclaux, TOCQUEVILLEFINANCE**
- **Capucine Gautier, LFDE**
- **Kate Horgan, CSS REGTECH**
- **Maseabi Marageni, INVESTEC**
- **Stephanie Ortbals-Tibbs, ICI GLOBAL**
- **Raquel Svec, FACTSET**

In association with IFF TRAINING

Participants

Presenter: Alison Campbell - Public speaking coach and mentor, Alison Campbell Associates

Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception

18:00 - 20:30

18:00-20:00 - FundForum International Drinks Reception

The FundForum International Party hosted by CACEIS

20:30 - 00:30

Langelinie Pavilion, Langelinie 10, 2100 Copenhagen. Located on the waterfront, next to Copenhagen's most famous tourist attraction – The Little Mermaid.

Coaches will be provided from AC Hotel Bella Sky & The Marriott Copenhagen and return to the same locations at the end of the event.

SCHEDULE

MAIN CONFERENCE DAY TWO - 2020 AGENDA COMING SOON - 26/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

TIME	ASSET ALLOCATOR ONLY	DATA AND BUILDING NEXT GEN ASSET MANAGEMENT - EXHIBITION STAGE	DISTRIBUTION - AUDITORIUM 10 & 11, 1ST FLOOR	FOR EVERYONE	GLOBAL MEGATRENDS - AUDITORIUM 10 & 11, 1ST FLOOR	INVESTMENT - ROOM 173, 1ST FLOOR	OPERATIONS - ROOM 180, 1ST FLOOR	SMART MARKET INTELLIGENCE - ROOM 181, 1ST FLOOR
07:00	**07:45** - APFI Breakfast -Global Developments in Fund Buying from Allocators in America, Europe, Africa, and Beyond ETFs and Active ETFs in the Portfolio		**07:45** - DISTRIBUTION SPECIAL FOCUS Global Distribution – Trends, challenges and solutions for keeping your place in a highly competitive industry					
08:00				**08:00** - Registration & Welcome Coffee	**08:30** - Welcome Day 2 from FundForum International **08:35** - Chairman's Welcome **08:40** - What next for globalisation? From trade wars, escalating climate-crisis to the populist backlash – how to manage risk when it is not global business as usual?			

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09:00					**09:15** - Asia/China Insight 2020: Is growth really over? Where to invest for the future **09:45** - How to deliver growth for savers today and protect values for our future? What do asset owners and investors want from asset managers as we move towards a new framework for investing for both for short term financial return and long term, low carbon economy			

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10:00	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:15** - Why we need to lead the way in finding and managing sustainable growth? How leading asset managers are pivoting global products and portfolios with new approaches to stewardship and strategies for managing portfolio volatility vs value **10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp	**10:45** - Morning Coffee & Networking Break PLUS Introducing The FundForum Next Gen Leaders' Voices Programme - Almost Stage-Ready Pitch-Camp

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11:00		**11:30** - Wealth management 2.0 Discussions Part 1 – Catch The Wave In NextGen Wealth: Trends and challenges for engaging the next generation's wealth transfer	**11:30** - Staying relevant 1: Why the next big challenge is not tech but people – what are the new rules of the culture and talent wars 2020 that will determine competitive advantage - and how can you retain your ability to stay relevant?			**11:30** - Fund Buyer Solutions Day 2	**11:30** - Leaders Panel: The asset manager of tomorrow - View from the back office	**11:30** - Smart Market Intelligence vs Wisdom of the Crowd 1: Emerging & frontier markets - from geopolitical risk to underappreciated geoeconomic opportunities what is the macro outlook through an emerging market lens?

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12:00		**12:15** - An exclusive insight into what it takes to launch a digital investment proposition at both a private and retail bank. This in conversation session will explore product development, branding and partnerships **12:45** - The Wealth Management 2.0 Discussions Part 3 - Who will get the affluent in Europe and the US: Bank or Insurer?	**12:00** - Staying relevant 2: Innovations at the customer front line of financial advice and wellbeing - what does this mean for wealth management platforms and asset managers **12:30** - Staying relevant 3: Briefing - How should the asset management business model evolve to address the structural shifts impacting the industry?				**12:00** - The asset servicing infrastructure of tomorrow: What will the next generation of asset servicing look like and what demands will drive this? **12:10** - The ecosystem of tomorrow: A look at the first data coming from the launch of the largest DLT infrastructure in financial institutions **12:30** - Debunking myths and misconceptions: Analysis of the impact of ETFs in the investment ecosystem	**12:00** - Emerging market regional experts spotlight: How it's different to invest through the lens of locals? **12:30** - APFI emerging and boutique asset manager selection & business development workshop
13:00	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2	**13:00** - Lunch & Networking Break PLUS break time programming - Danish Deep Tech Showcase Part 1 HealthTech; plus Boutique Fund Quickfire Showcase with Live Investor and Pitch Doctor Feedback t 2

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14:00		**14:15** - Comparing global progress in retail and financial inclusion: How is digital innovation enabling the building of reliable long-term pensions, savings and low-cost investment solutions? **14:45** - Open banking and APIs: New thinking about how we can build a behavioural savings system that overcomes complexity and works for everyone	**14:15** - Nordic fund selectors - managing the asset manager / selector relationship for mutual benefit **14:45** - Nordic Institutional Investors in the spotlight: indepth investment strategy and challenges			**14:15** - Alternative risk praemia solutions in the portfolio: How to think about liquidity and volatility **14:45** - The new multi-asset institutional solutions portfolio: Which approaches have proved resilient in the downturn and why?	**14:15** - Evaluating regulatory impact: Strategic approaches for a global operating model **14:45** - Are COOs leaving money on the table?	**14:15** - Smart market intelligence vs wisdom of the crowd 3: So what's next in fixed income and sovereign markets and what is the changing role of data intelligence? **14:45** - Smart market intelligence vs wisdom of the crowd 4: New developments in alternative credit from the first digital securitisation of SME loans to ABS – how the global debt market works with APIs and enables the diversification and broadening of investor pool

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15:00		**15:15** - AdvisorTech and Robo 2.0 – Putting next gen wealth management into practice: How are customers selecting investment propositions and engage with investments digitally across UK and Continental Europe? **15:45** - Data-driven Ideas, ambition and talent networks in Chinese entrepreneurship: Next generation Chinese Venture Capital Showcase	**15:15** - Spotlight on German Institutional Investors: How to run client's money with new challenges to fiduciary duty **15:45** - What you always wanted to ask… DACH-region top-tier wholesale-selectors: The global crowd sourced question session			**15:15** - Passive core and active blending: Best practice fund selection and portfolio construction – new thought-leadership on core and satellite to smooth volatility	**15:15** - Why training the organisation and not just the data team is vital **15:45** - Data as a differentiator: Strategies for supporting business growth and driving customer insights	**15:15** - An audience with a leading China Strategist – understanding the changing political forces in China and the implications for the direction of the domestic socio-economic agenda **15:45** - Smart Market Intelligence meets the Wisdom of The Crowd 5: The future of Europe – From the implications of the rise of Chinese investment to the ascendance of the right, how is Europe succeeding in addressing the big geopolitical questions of its time?

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16:00	**16:15** - Afternoon Coffee & Networking Break	**16:15** - Afternoon Coffee & Networking Break **16:45** - FundForum "Almost Stage Ready" Public Speaking Showcase - CLICK TO SEE THE LINE UP - Following our public speaking bootcamp, come and cheer a generation of new voices speak for 2 minutes on a personal passion	**16:15** - Afternoon Coffee & Networking Break **16:45** - Fund distribution in private and retail banking networks in Europe	**16:15** - Afternoon Coffee & Networking Break	**16:15** - Afternoon Coffee & Networking Break	**16:15** - Afternoon Coffee & Networking Break	**16:15** - Afternoon Coffee & Networking Break	**16:15** - Afternoon Coffee & Networking Break **16:45** - Geo-Economic Disrupters War-Game Trilogy Part 2- Wealth management transformed: "When Jung Met Arnold" – How neuro AI and carbon units ("Humans") will terminate first gen robo-advising. How has the game has played out in North America and what can we learn about managing and marketing in the digital era?
17:00								
18:00	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception	**18:00** - Evening Drinks Receptions including the FundForum Women In Funds Drinks Reception
19:00								

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20:00	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS	**20:30** - The FundForum International Party hosted by CACEIS

Welcome to FundForum

09:25 - 09:30
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Presenter: Jenny Adams - Global Executive Producer, FundForum International

FundForum Sustainability Day Welcome

09:30 - 09:40
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Chair: Alyssa Heath - Senior Policy Manager, UN PRI (Principles of Responsible Investment)

EU Sustainable Finance Action Plan: What next for asset management - An update of actions that have already been agreed or launched in the asset management field in in the context of broader and what is coming down the track

09:40 - 09:50
Global Megatrends - Auditorium 10 & 11, 1st Floor

An update on recently agreed regulation to strengthen disclosure by funds on sustainability risks and impact, to work on strengthening fiduciary duties as regards integration of sustainability and work on an EU ecolabel for funds and other financial products. All this is being done within the context of our broader EU Sustainable Finance Action Plan.

Participants

Presenter: Sven Gentner - Head of Asset Management Unit, DG FISMA, EU Commission

How to manage systemic climate risk globally. Why mutual funds, institutional investors and other players in the financial sector must be at the heart of tackling climate crisis or risk failing millions of investors as stranded assets become worthless

09:50 - 10:20
Global Megatrends - Auditorium 10 & 11, 1st Floor

"Fail to adjust to climate risks or fail to exist"
Mark Carney, Governor Bank of England & François Villeroy de Galhau, the governor of the Banque de France

How to deploy the "massive reallocation of capital" necessary to prevent global warming above the 2°C maximum target.

Comparing the opportunities in the private, public and blended responsible investment sectors and the practical implications of differences in liquidity, tenor, availability of data, regulation in making investment decisions.

The Central Banks and Supervisors Network for Greening the Financial System (NGFS)

Climate Action 100+ is an investor initiative to ensure the world's largest corporate greenhouse gas emitters take necessary action on climate change. More than 320 investors with more than $33 trillion in assets collectively under management are engaging companies on improving governance, curbing emissions and strengthening climate-related financial disclosures. The companies include 100 'systemically important emitters', accounting for two-thirds of annual global industrial emissions, alongside more than 60 others with significant opportunity to drive the clean energy transition.

Participants

Moderator: Kirsten Spalding - Senior Department Director, Investor Network, Ceres

Presenter: Sven Gentner - Head of Asset Management Unit, DG FISMA, EU Commission

Speaker: Niklas Ekvall - Chief Executive Officer, Fourth Swedish National Pension Fund (AP4)

Speaker: Stephen Barrie - Deputy Director, Ethics and Engagement; Acting Secretary | Ethical Investment Advisory Group, Church of England Pension Fund

Speaker: Allan Polack - Group CEO, PFA Pension

A new infrastructure for scaling the greening of brown investments in Middle East, Asia Pacific and Africa – How blockchain and smart contracts are transforming impact investments and the shifting the transformation of the carbon-economy

10:20 - 10:50
Global Megatrends - Auditorium 10 & 11, 1st Floor

Participants

Presenter: Steve Barnett - Financial Centre Development Director, Abu Dhabi Global Market

Morning Coffee & Networking Break

10:50 - 11:30

Why we need mutual funds - Financial services and the circular economy: A new systemic Initiative on how financial services should think about its role in enabling the regenerative economy – New business models for future growth and implications for investment

11:30 - 12:00
How To Think About Sustainability: Asset Owners, Corporates and Mutual Funds On The Opportunities in De-carbonised and Regenerative Economy

Why we need the mutual funds: Pathways of the outliers - Without the combined capital and commitment of both institutional investors and mutual funds we cannot address sustainability and global systemic risks affecting us all in climate, water and supply chains

One of the major factors holding back action to address climate change in the financial industry is a recognition that there is a values-based element at play. The mathematical models that produce the optimal investment decisions that have limited the consideration of ethical values in finance also limit the potential for change until it can be empirically proven. Even where these data may exist to support values-based finance, they often struggle to capture the attention of the mainstream because there is an internal bias towards incrementalism within finance that constrains action.

The movement towards change has been systematized in the Sustainable Development Goals and the pace of change is only likely to hasten as businesses and governments buy in. They will also be reflected in finance, whether the bankers and asset managers wish them to be, and the advantage will go to those who anticipate rather than those who react.

Participants

Moderator: Rob Opsomer - Systemic Initiatives Lead, Ellen Macarthur Foundation

Speaker: Robert Metzke - Chief of Staff, Innovation & Strategy, Royal Philips

Speaker: Stefano Del Punta - Chief Financial Officer, Intesa Sanpaolo Group

Breakthroughs in measuring impact - How do you compare and prove the best new opportunities for profit and impact? New best practice in transparently showing how impact is measured and compared across different case studies – from renewable energy in India to healthcare in Africa and a university in Brazil.

11:30 - 12:00
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Gavin Serkin - Author of Frontier (Bloomberg) - FT "must read" - & Founder and Managing Editor, New Markets Media & Intelligence

Presenter: Shami Nissan - Head of Responsible Investing,, Actis

Presenter: Stephen J. Barnett - CEO & Founder, Util

Geo-Economic Disrupters War-Game Trilogy Part 3: 4D Chess - Digital Data Disruption of Digital Disruptors AKA what now after the demise of the BAATFAANGS? In this third and final part of the War Game Trilogy, as predicted, the long-in-the-tooth FAANGS took a dive in 2018—so who waits in the shadows, like Siamese Fighting Fish, to challenge the remnant(s)?

11:30 - 12:45
Data and Building Next Gen Asset Management - Exhibition Stage

The remains of the data---the reactor fuel of our AI Quantum future—will now move from weak hands to strong. Who are the emerging players? How will they play the Cybersecurity and Datafication Dominance long game? Where are the asset management arbitrage "white spaces"? And what about the fifth "D" (Distortion) of asset classes---the bond market.

Participants

Moderator: Brian Byrne - CEO, Futurist, War-Gamer, Aviador Group

Asia and the $20 trillion opportunity at the frontier for climate investing and innovation: How are Chinese corporates from private, public and private equity/ debt thinking about investing in Green Tech and how are Asian asset managers developing product and distribution??

12:00 - 12:45
How To Think About Sustainability: Asset Owners, Corporates and Mutual Funds On The Opportunities in De-carbonised and Regenerative Economy

12.00-12.15 Part 1 How are Chinese corporates from private, public and private equity/ debt thinking about partnering and investing in Green Tech?

Luis Pinto, Executive Board member, HAITONG CAPITAL

Katherine Han, Vice President, Senior ESG Specialist, HARVEST FUND MANAGEMENT

12.15-12.30 Part 2 How influential Asian Asset Managers are thinking about green collaboration climate investing and the international distribution potential

With Zhongbao Guo, Head of International Business Department, GUOTAI JUNAN SECURITIES CO

David Semaya, Executive Chairman, SUMITOMO MITSUI TRUST ASSET MANAGEMENT

Tomas Otterström, Advisory Partner. Global Leader, Sustainable Finance, KPMG

How China's capital market is embracing responsible/ green investment, the uniqueness of China's RI demand and policy push

-what approaches do local investors take in implementing responsible investment, what are the challenges and opportunities

-how global investors can make impact in terms of ESG & responsible investment in China's A share market

12.30-12.45 Part 3 Open Discussion

Participants

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

Speaker: Luis Valenca Pinto - Executive Board Member, Haitong Capital

Speaker: Katherine Han - Vice President, Head of ESG Research, Harvest Fund Management

Speaker: Zhongbao Guo - Head of International Business Department, Guotai Junan Securities

Speaker: David Semaya - Executive Chairman, Sumitomo Mitsui Trust Asset Management

Speaker: Tomas Otterström - Global Leader, Sustainable Finance Services, KPMG International

A UN PRI Working Party update: Markets, Metrics and Benchmarks to enhance the distribution of low carbon investment products

12:00 - 12:45
Smart Market Intelligence - Room 181, 1st Floor

Participants

Moderator: Alyssa Heath - Senior Policy Manager, UN PRI (Principles of Responsible Investment)

Speaker: Helena Viñes Fiestas - Global Head of Sustainability Research,, BNP Paribas Asset Management

Speaker: Sara Lovisolo - Group Sustainability Manager, Borsa Italiana

Lunch & Networking Break PLUS break time programming: Danish Deep Tech Alliance Part 2: Sustainability & Inclusion

12:45 - 14:15

Break time programming on the Data and Next Gen Leadership Stage

13.00 – 13.00 Danish Deep Tech Alliance Part 2: Sustainability & Inclusion
Innovation Showcase of some of the most interesting entrepreneurs and new tech start-ups on the Danish scene. The goal is to establish an International DeepTech Alliance to strengthen the Danish deep-tech start-ups and their collaboration with universities and tech companies.

Participants

Moderator: Camilla Gilbro - Project Manager, Deep Tech Alliance

Presenter: Johan Juul -Jensen - Chief Operating Officer, Solarsack

Presenter: Mikkel Nybo Anderson - Founder, LifeGuard

Close of FundForum 2019

14:15 - 14:20

SCHEDULE

MAIN CONFERENCE DAY THREE - 2020 AGENDA COMING SOON - 27/06/2019

TIME	DATA AND BUILDING NEXT GEN ASSET MANAGEMENT - EXHIBITION STAGE	GLOBAL MEGATRENDS - AUDITORIUM 10 & 11, 1ST FLOOR	HOW TO THINK ABOUT SUSTAINABILITY: ASSET OWNERS, CORPORATES AND MUTUAL FUNDS ON THE OPPORTUNITIES IN DE-CARBONISED AND REGENERATIVE ECONOMY	SMART MARKET INTELLIGENCE - ROOM 181, 1ST FLOOR
09:00		**09:25** - Welcome to FundForum **09:30** - FundForum Sustainability Day Welcome **09:40** - EU Sustainable Finance Action Plan: What next for asset management - An update of actions that have already been agreed or launched in the asset management field in in the context of broader and what is coming down the track **09:50** - How to manage systemic climate risk globally. Why mutual funds, institutional investors and other players in the financial sector must be at the heart of tackling climate crisis or risk failing millions of investors as stranded assets become worthless		
10:00	**10:50** - Morning Coffee & Networking Break	**10:20** - A new infrastructure for scaling the greening of brown investments in Middle East, Asia Pacific and Africa – How blockchain and smart contracts are transforming impact investments and the shifting the transformation of the carbon-economy **10:50** - Morning Coffee & Networking Break	**10:50** - Morning Coffee & Networking Break	**10:50** - Morning Coffee & Networking Break

SCHEDULE

MAIN CONFERENCE DAY THREE - 2020 AGENDA COMING SOON - 27/06/2019

FundForum International

Main Conference: 23-25 June, 2020
Summits: 22 June, 2020
Bella Center
Copenhagen

TIME	DATA AND BUILDING NEXT GEN ASSET MANAGEMENT - EXHIBITION STAGE	GLOBAL MEGATRENDS - AUDITORIUM 10 & 11, 1ST FLOOR	HOW TO THINK ABOUT SUSTAINABILITY: ASSET OWNERS, CORPORATES AND MUTUAL FUNDS ON THE OPPORTUNITIES IN DE-CARBONISED AND REGENERATIVE ECONOMY	SMART MARKET INTELLIGENCE - ROOM 181, 1ST FLOOR
11:00	**11:30** - Geo-Economic Disrupters War-Game Trilogy Part 3: 4D Chess - Digital Data Disruption of Digital Disruptors AKA what now after the demise of the BAATFAANGS? In this third and final part of the War Game Trilogy, as predicted, the long-in-the-tooth FAANGS took a dive in 2018—so who waits in the shadows, like Siamese Fighting Fish, to challenge the remnant(s)?		**11:30** - Why we need mutual funds - Financial services and the circular economy: A new systemic Initiative on how financial services should think about its role in enabling the regenerative economy – New business models for future growth and implications for investment	**11:30** - Breakthroughs in measuring impact - How do you compare and prove the best new opportunities for profit and impact? New best practice in transparently showing how impact is measured and compared across different case studies – from renewable energy in India to healthcare in Africa and a university in Brazil.
12:00	**12:45** - Lunch & Networking Break PLUS break time programming: Danish Deep Tech Alliance Part 2: Sustainability & Inclusion	**12:45** - Lunch & Networking Break PLUS break time programming: Danish Deep Tech Alliance Part 2: Sustainability & Inclusion	**12:00** - Asia and the $20 trillion opportunity at the frontier for climate investing and innovation: How are Chinese corporates from private, public and private equity/ debt thinking about investing in Green Tech and how are Asian asset managers developing product and distribution?? **12:45** - Lunch & Networking Break PLUS break time programming: Danish Deep Tech Alliance Part 2: Sustainability & Inclusion	**12:00** - A UN PRI Working Party update: Markets, Metrics and Benchmarks to enhance the distribution of low carbon investment products **12:45** - Lunch & Networking Break PLUS break time programming: Danish Deep Tech Alliance Part 2: Sustainability & Inclusion
13:00				
14:00	**14:15** - Close of FundForum 2019	**14:15** - Close of FundForum 2019	**14:15** - Close of FundForum 2019	**14:15** - Close of FundForum 2019