



# FUNDS CONGRESS 2023

THURSDAY 9 FEBRUARY

Day Moderator – John Pienaar

All agenda timings in GMT

## 8:15 a.m. – 9:00 a.m. REGISTRATION AND BREAKFAST

9:00 a.m. **Welcome and Opening Remarks**

**Moderator: John Pienaar**, Former Deputy Political Editor and Presenter of Weekly Westminster Round-up of 'Pienaar's Politics'

**John Donohoe**, Founder and Group CEO, Carne Group

**Steven Libby**, Asset and Wealth Management ('AWM') EMEA Leader, Partner, PwC

**Carol Widger**, Partner, Dechert

## PART I – STATE OF THE INDUSTRY

9:10 a.m. – 9:25 a.m. **Keynote: The Role of the UK Asset Management Industry and its Position as a Global Player**  
**Andrew Griffith MP**, Economic Secretary

9:25 a.m. – 9:55 a.m. **Fireside: Geopolitics in 2023: Market Impact and Changing Globalisation**  
**Neil Brown**, Geopolitical Strategist, CQS (UK) LLP

9:55 a.m. – 10:35 a.m. **Panel Discussion: Investor Perspectives**  
*Find out how investor concerns are changing and how your peers are responding to these demands.*

**Moderator: Mike O'Brien**, Non-executive Director, Carne Group

**Carmel Jordan**, CEO, Mercer Global Investments Management Ltd

**David Rae**, Head of Strategic Client Solution, Russell Investments

**Karen Zachary**, CEO, CRUX Asset Management

10:35 a.m. – 11:15 a.m. **Panel Discussion: What Next for Alternatives?**  
*A deep dive into current and future trends from secondaries to retailisation, the rise of the mega multi-managers and sourcing profitable growth opportunities in an increasingly challenging market.*

**Moderator: Sabina Comis**, Global Managing Partner-elect, Dechert LLP

**David Allen**, CEO, StepStone Group

**Brian Laureano**, Investment Principal and Head of Business Development for S3 Credit Solutions, Apollo

**Mark Tucker**, Managing Director, KKR

## 11:15 a.m. – 11:45 a.m. COFFEE BREAK

## PART II GLOBAL REGULATORY OUTLOOK

11:45 a.m. – 12:00 p.m. **Keynote: A European Perspective on Supervisory Priorities in the Asset Management Sector**  
**Antonio Barattelli**, Head of Unit, Investment Management Unit, Investor Protection and Sustainable Finance Department, ESMA



**12:00 p.m. – 12:40 p.m. Panel Discussion: Regulatory Priorities for 2023 and Beyond**

**Moderator: Angelo Lercara**, Partner, Dechert LLP

**Antonio Barattelli**, Head of Unit, Investment Management Unit, Investor Protection and Sustainable Finance Department, ESMA

**Camille Blackburn**, Director of Wholesale Buy-side, Financial Conduct Authority (FCA)

**James O'Sullivan**, Head of Function – Fund and Firm Authorisations, Central Bank of Ireland (CBI)

**Philippe Sourlas**, Deputy Secretary General in charge of the Asset Management Department, Autorité des Marchés Financiers (AMF)

**Laurent van Burik**, Head of Unit, Commission de Surveillance du Secteur Financier (CSSF)

**12:40 p.m. – 1:10 p.m. Special Guest Speaker**

**Elizabeth Day**, Award-winning Journalist, Author and Broadcaster

**1:10 p.m. – 2:15 p.m. NETWORKING LUNCH**

**PART III – SUSTAINABLE INVESTING AND THE TRANSITION TO NET ZERO**

**2:15 p.m. – 2:30 p.m. Keynote: Fund Forum: How the Market Can Become a Force for Good**

**Robert Gardner**, Co-CEO and Co-founder, Rebalance Earth

**2:30 p.m. – 3:15 p.m. Panel Discussion: Looking Beyond the 'E' of ESG**

*Meeting the challenges of delivering on S & G whilst balancing profit with positive social impact, including sustainable investing; an ever-growing focus for forward-thinking investment managers.*

**Moderator: Albertha Charles**, UK AWM Leader, PwC

**Dr. Julia Backmann**, Managing Director, Head of EU Business Legal, Allianz Global Investors

**Robert Gardner**, Co-CEO and Co-founder, Rebalance Earth

**Claire Glennon**, Head of Sustainability – UK, Schroders

**Geoffroy Marcassoli**, ESG and Sustainable Finance Partner, PwC

**Amanda Young**, Chief Sustainability Officer, abrdn

**3:15 p.m. – 3:40 p.m. COFFEE BREAK**

**PART IV – LOOKING AHEAD**

**3:40 p.m. – 3:55 p.m. Keynote: The Global Economy in 2023 and Beyond**

**James Pomeroy**, Global Economist, HSBC Bank

**3:55 p.m. – 4:10 p.m. Keynote: The Impact of Geopolitical Events on Asset Management**

**Lord Gavin Barwell**, Senior Advisor, PwC

**4:10 p.m. – 4:50 p.m. Panel Discussion: The Role of Tech in Distribution**

**Moderator: Veronica Buffoni**, Managing Director, Carne Group

**Andy O'Callaghan**, Global Advisory Leader, Asset and Wealth Management, PwC

**Joe Parkin**, Head of Banks and Digital Channels in the UK, BlackRock

**Olivier Portenseigne**, CEO, FundsDLT

**Tom Slocock**, Head of International Product and Origination, iCapital

**4:50 p.m. – 5:30 p.m. Keynote: Uncharted – How to Navigate the Future**

**Dr. Margaret Heffernan**, Author and CEO

**5:30 p.m. – 5:45 p.m. Conference Wrap-up**

**John Pienaar**, Former Deputy Political Editor and Presenter of Weekly Westminster Round-up of 'Pienaar's Politics'

**5:45 p.m. onwards DRINKS RECEPTION**