



London

13 October 2021

Park Plaza Westminster Bridge, London

Agenda

TSAM London: we're back!



We are excited to welcome the buy-side community, in-person at TSAM London in 2021.

On 13th October 2021, TSAM (The Summit for Asset Management) will bring together leading asset management firms to discuss the latest challenges facing the buy-side community, as well as the evolving technology and regulatory landscape.

Buy-side attendees get complimentary access to all 6 content tracks, as well as networking events, and post-event drinks.

- **ESG**
- **Investment Operations**
- **Data & Technology**
- **Marketing & Client Services**
- **Risk & Performance**
- **Regulations & Compliance**



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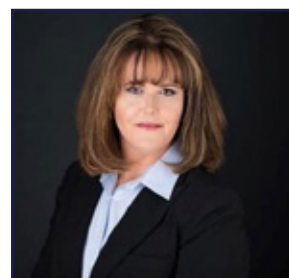
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Manager,
Ruffer LLP



Nicolas Firzli,
Director General,
World Pensions Council



Paul Taylor,
Independent consultant



Renata Hoes,
Consultant, Trainer,
Analysis International



Sujana Nadarajah,
Chief Compliance Officer,
*TwentyFour Asset
Management*

Speakers



Adrian Clark,
Head of Business
Risk and Governance,
International,
RBC Global Asset
Management



Adam Jacobs-Dean,
Managing Director, Head
of Markets, Governance
and Innovation,
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Chris Taylor,
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CG Asset
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Angela Greenough,
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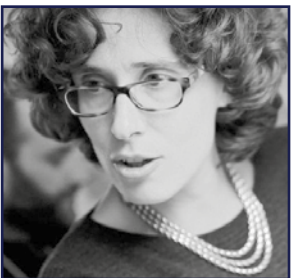
Ben Mason,
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Benedict Kingsmill,
Senior Client Partner,
Enterprise Financial
Services,
LinkedIn Marketing
Solutions



Therese Niklasson,
Global Head of
Sustainability,
Ninety One



Camilla Bossi,
Business Development
Manager,
ESG Solutions,
Confluence



Cheryl Cole,
Editor,
DiversityQ



Daniel Johnson,
SVP, Fund Administration,
SS&C Technologies



Daniel Sandmann,
Independent Wealth
Manager



Bruno Maradei,
Head of Responsible
Investment,
Aegon Asset
Management



Erwin Jager,
Manager Data
Management,
PGGM Investments



Glenn Murphy,
Chief Operating Officer,
Multrees Investor
Services



David Butcher,
Managing Director
and Founder,
Communications
and Content



Ilai Schechter,
Integration
Project Manager,
Hurst Point Group



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Managing Director of
Financial Services,
Seismic



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Kyra Brown,
Regulatory
Development Manager,
Aviva Investors



Margarita Pirovska,
Director of Policy,
Principles for
Responsible Investment



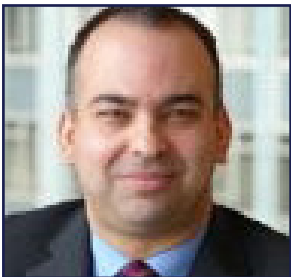
Nicolas Firzli,
Director General,
World Pensions Council



Kate Laing Global,
Co-head of Compliance
and Head of Compliance,
Europe Muzinich & Co.



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



Marco di Palma,
Head of Commercial
Operations,
JP Morgan Asset
Management



Natalie Kenway,
Global Head of ESG
Insight,
ESG Clarity



Rickie Glasgow,
Senior Investment
Data Specialist - Global
Investment Data
Management (GIDM),
Vanguard



Ritu Shirgaokar,
Senior Vice President
and Head of Legal,
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Robert Corbally,
COO,
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Devlin Mambo



Tatjana Greil Castro,
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Vona Aghoghovbia-Ezichi,
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Vian Sharif,
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Adam Jacobs-Dean,
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of Markets, Governance
and Innovation,
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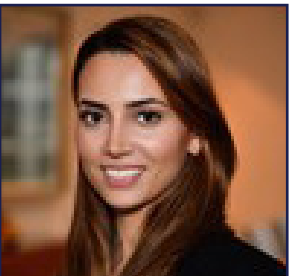
Andrew Milligan,
Independent consultant



Graeme Devlin,
Managing Partner,
Devlin Mambo



Mark Babington,
Executive Director,
Regulatory Standards,
Financial Reporting
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Zeynep Madeiros,
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Tony Burke,
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Tim Arengo-Jones,
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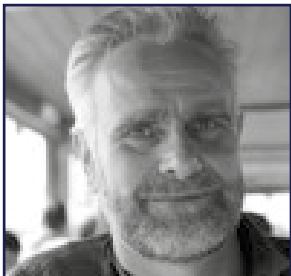
Gabriel Callsen,
Director, Market Practice
and Regulatory Policy,
International Capital
Market Association



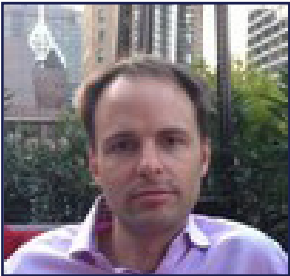
Ian Robinson,
Head of Data Change,
Jupiter Asset
Management



Matt Stevens,
Head of Marketing,
Consultant



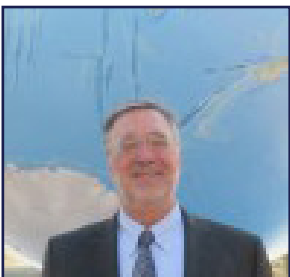
Peter Jackson,
Chief Data and
Analytics Officer,
Exasol



Stephen Collie,
Technical Sales Lead,
FINBOURNE Technology



Verena Charvet,
Specialist Consultant,
Merlys Consulting



William Pryor,
Founding President,
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Kroum Sourov,
Lead Sovereign
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Candriam



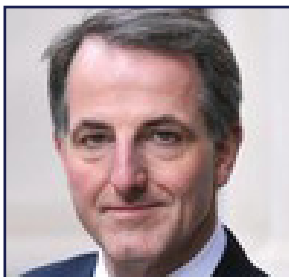
Katie Prideaux,
Investment
Analytics Lead,
The Yield Book



Emily Prince,
CEO,
The Yield Book Inc.
& Group Director,
Fixed Income Analytics,
LSEG



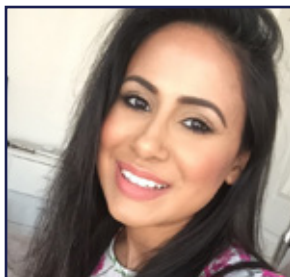
Yugo Ashida,
Head of ISS Enterprise
Architecture,
Fidelity International



Mikkel Bates,
Regulatory Manager,
FE Fundinfo



Nick Silver,
Director & co-founder,
Climate Bonds Initiative



Priya Jadeja,
Pre-sales Consultant,
Autorek

8:00 - Registration					
08:55 - Chair's Opening Remarks					
<p>09:00 - Opening Keynote: How is ESG transforming the asset management industry?</p> <p>Moderator: Nicolas Firzli, Director General, World Pensions Council Speakers: Brunno Maradei, Head of Responsible Investment, Aegon Asset Management Andrew Milligan, Independent Consultant Mark Babington, Executive Director, Regulatory Standards, Financial Reporting Council Daniel Johnson, SVP, Fund Administration, SS&C Technologies</p>					
09:45 - FINBOURNE Technology Keynote					
<p>Grasping the Nettle: Tackling the data sting</p> <p>Speaker: Thomas McHugh, CEO, FINBOURNE</p>					
10:30 - Morning Break					
ESG	Investment Operations	Data & Technology	Marketing & Client Services	Regulations & Compliance	
<p>11:10 - Chair's Welcome Address:</p> <p>Nicolas Firzli, Director General, World Pensions Council</p>	<p>11:10 - Chair's Welcome Address:</p> <p>Glenn Murphy, Chief Operating Officer, Multrees Investor Services</p>	<p>11:10 - Chair's Welcome Address:</p> <p>William Pryor, Founding President, Investics Data Services</p>	<p>11:10 - Chair's Welcome Address:</p> <p>Tony Burke, Partner, Helford Capital Partners</p>	<p>11:10 - Chair's Welcome Address:</p> <p>Paul Taylor, Independent Consultant</p>	
<p>11:15 - Panel Discussion:</p> <p>Implementation of ESG regulations – Practical discussion on how firms can navigate the challenges and deliver success</p> <p>Speakers: Adrian Clark, Head of Business Risk and Governance, International, RBC Global Asset Management Adam Jacobs-Dean, Managing Director, Head of Markets, Governance and Innovation, AIMA Verena Charvet, Specialist Consultant, Merlys Consulting Camilla Bossi, Business Development Manager, ESG Solutions, Confluence</p>	<p>11:15 - Panel Discussion:</p> <p>Cross business collaboration and cross functional alignment – A true reflection of operational harmony</p> <p>Speakers: Kevin Telfer, Head of the Data Management Office, Aegon Asset Management Robert Corbally, COO, Variety Capital Limited</p> <p>11:45 - Panel Discussion:</p> <p>Dealing with your data demons – Defeating your data threats, to win back operational trust</p> <p>Moderator: Tom McHugh, CEO, FINBOURNE Technology Speakers: Emily Prince, CEO, The Yield Book Inc. & Group Director, Fixed Income Analytics, LSEG Yugo Ashida, Head of ISS Enterprise Architecture, Fidelity International</p>	<p>11:15 - Panel Discussion:</p> <p>Focusing on the full data lifecycle – Creating an end-to-end data strategy with all the processes and controls around data governance</p> <p>Moderator: Hugh Burden, Commercial Director, Autorek Speakers: Mary-Patricia Hall, Data & Reporting Manager, Ruffer LLP Rickie Glasgow, Senior Investment Data Specialist - Global Investment Data Management (GIDM), Vanguard</p>	<p>11:15 - Fireside Chat:</p> <p>Digital Engagement throughout the investor lifecycle – Using the right tools and technology to stand out from the crowd</p> <p>Speaker: Ross Duncton, Managing Director, Head of Marketing, BMO Global Asset Management (EMEA)</p>	<p>11:15 - Fireside Chat:</p> <p>Post Brexit regulatory landscape – Divergence and equivalence, where are we now and where to go from here?</p> <p>Speakers: Kyra Brown, Regulatory Development Manager, Aviva Investors Kate Surala, Chief Compliance Officer, The Analyst Research Graeme Devlin, Managing Partner, Devlin Mambo</p>	
<p>12:00 - Panel Discussion:</p> <p>Aligning and uptake of ESG data – Utilising it for portfolio scoring, performance measurement and risk analysis</p> <p>Speakers: Simba Mamboininga, Managing Partner, Devlin Mambo Kroum Sourov, Lead Sovereign ESG Analyst, Candriam Katie Prideaux, Investment Analytics Lead, The Yield Book</p>	<p>12:25 - Fireside Chat:</p> <p>Driving down cost while increasing digital capabilities – Transformation done right</p> <p>Speaker: Stephen Collie, Technical Sales Lead, FINBOURNE Technology</p>	<p>12:00 - Presentation:</p> <p>Data management as a business capability – How relevant are your data strategies and is it fit for purpose?</p> <p>Speaker: Erwin Jager, Manager Data Management, PGGM Investments</p>	<p>11:45 - Presentation:</p> <p>Truth about trust in the digital Age: Building long-lasting relationships with new generations of customers</p> <p>Speaker: Bill Finnegan, Managing Director of Financial Services, Seismic</p>	<p>12:00 - Presentation :</p> <p>AIFMD review – How will future changes impact delegation to third countries?</p> <p>Speaker: Renata Hoes, Consultant, Analysis International</p>	
<p>12:35 - Panel Discussion:</p> <p>Embarking on your ESG data journey – Establishing global ESG standards, eco labelling of products, green passporting and beyond</p> <p>Speakers: Mikkel Bates, Regulatory Manager, FE Fundinfo Vian Sharif, Head of Sustainability, FNZ Group James d'Ath, Managing Director, Head of Markets, Governance and Innovation, Sustainix</p>	<p>12:50 - Fireside Chat:</p> <p>Governance under the light of operational resilience – What does it mean for senior managers and the wider business?</p> <p>Speaker: Dan Ridler, Managing Director, BCS Consulting</p>	<p>12:30 - Presentation:</p> <p>Automating data integrity – Delivering FinOps excellence in the back and middle-office</p> <p>Speaker: Hugh Burden, Commercial Director, Autorek Priya Jadeja, Pre-sales Consultant, Autorek</p>	<p>12:15 - Fireside Chat:</p> <p>Tips for successful digitalization in distribution</p> <p>Speaker: Matt Stevens, Head of Marketing, Consultant</p> <p>12:45 - Fireside Chat:</p> <p>Changing nature and evolution of client – How do you cater for the new generation of investors?</p> <p>Speakers: David Butcher, Managing Director and Founder, Communications and Content Bill Finnegan, Managing Director of Financial Services, Seismic</p>	<p>12:30 – Fireside Chat:</p> <p>Operational resilience and DORA – Understanding regulatory expectation and meeting standards</p> <p>Speaker: Ben Mason, Managing Director, BCS Consulting</p>	
13:15 - Lunch Break					
<p>14:30 - Dialogue:</p> <p>ESG effectiveness and governance: The future of financial markets</p> <p>Speaker: Ritu Shirgaokar, Senior Vice President and Head of Legal, State Street Nicolas Firzli, Director General, World Pensions Council</p>	<p>14:30 - Fireside Chat:</p> <p>How resilient is your business model – Maintaining service levels and capabilities throughout the pandemic</p> <p>Speaker: Chris Taylor, Chief Operations Officer, CG Asset Management Limited</p>	<p>14:30 - Fireside Chat:</p> <p>Importance of a CDO for asset management organizations</p> <p>Speaker: Peter Jackson, Chief Data and Analytics Officer, Exasol</p>	<p>14:30 - Panel Discussion:</p> <p>What is the next move towards bespoke client engagement? – The use of AI and hyper personalisation for client reporting and digital marketing</p> <p>Speakers: Chawki Karam, Head of EMEA Strategy, Aperture Investors Julian Samways, Founder, JPES Partners Neil Fatharly , Member of Board of Advisors, FSMarTech</p>	<p>14:30 - Panel Discussion:</p> <p>EU retail investment strategy – Empowering investors, improving market outcomes and bringing back trust in capital markets</p> <p>Speakers: Jarkko Syyrila, Head of Public Affairs, Nordea Wealth Management Stephane Janin, Head of Global Regulatory Development, AXA Investment Managers Daniel Sandmann, Independent Wealth Manager</p>	
<p>15:00 - Panel Discussion:</p> <p>All you need to know about 'Net Zero Asset Managers Initiative' – Taking action to ensure zero emission and steady eco recovery</p> <p>Speakers: Therese Niklasson, Global Head of Sustainability, Ninety One Tatjana Greil Castro, Co-Head of Public Markets Portfolio Manager Global Credit Strategies, Muzinich & Co.</p>	<p>14:50 - Panel Discussion:</p> <p>Building the right processes and capabilities that support our business strategies – Investing in the innovative tools and technology to align your operating model</p> <p>Speakers: Ilai Schechter, Integration Project Manager, Hurst Point Group Tim Arengo-Jones, VP, Head of Account Management, EMEA, Enfusion Zeynep Madeiros, Head of Investment Operations Service, Europe, Vanguard</p>	<p>15:00 - Panel Discussion:</p> <p>Driving real value from your data model – Why data management shouldn't be a tick box exercise.</p> <p>Speakers: Gabriel Callsen, Director, Market Practice and Regulatory Policy, International Capital Market Association Thomas McHugh, CEO, FINBOURNE Technology Ian Robinson, Head of Data Change, Jupiter Asset Management</p>	<p>15:15 - Presentation:</p> <p>Using social media to your advantage – Generate leads, increase engagement and retain clients</p> <p>Speaker: Jeroen Bruckwilder, Head of Digital Marketing, NN Investment Partners</p>	<p>15:15 - Panel Discussion:</p> <p>SFDR – Highlights, challenges and delivery to date: all you need to know to get prepared for the next phase</p> <p>Speakers: Sujan Nadarajah, Chief Compliance Officer, TwentyFour Asset Management Kate Laing, Global Co-head of Compliance and Head of Compliance, Europe, Muzinich & Co. Katie Ryan, Principal Consultant, BCS Consulting</p>	
<p>15:45 - Presentation:</p> <p>Developments in sustainable finance around the world – Interpreting disclosures, reporting requirements and taxonomy at a global scale</p> <p>Speaker: Margarita Pirovska, Director of Policy, Principles for Responsible Investment</p> <p>16:05 - Closing Speech:</p> <p>Finance, society & sustainability: How to make the finance system work?</p> <p>Speaker: Nick Silver, Director & co-founder, Climate Bonds Initiative (CBI)</p>	<p>15:35 - Panel Discussion:</p> <p>Consolidating and managing outsourced relationships for better workflow and transparency front to back</p> <p>Speakers: Marco di Palma, Head of Commercial Operations, JP Morgan Asset Management Angela Greenough, Partner, CMS</p>	<p>15:45 - Presentation:</p> <p>Cloud Migration - Lift and Shift vs. Native</p> <p>Speaker: William Pryor, Founding President, Investics Data Services</p>	<p>15:45 - Fireside Chat:</p> <p>Leveraging AI, digital marketing tools and smart data in a virtual word – Altering the dimensions of sales and client relations for good</p> <p>Speaker: Benedict Kingsmill, Senior Client Partner, Enterprise Financial Services, LinkedIn Marketing Solutions</p>		
16:15 - Afternoon Break					
<p>17:00 - Closing Keynote Diversity and Inclusion in asset management – Beyond gender markers, race and ethnicity</p> <p>Moderator: Natalie Kenway, Global Head of ESG Insight, ESG Clarity Speakers: Vona Aghoghovbia-Ezichi, Global Director of Accounting, Work Dynamics, JLL Mandy Kirby, Chief Strategist and Co-founder, City Hive Cheryl Cole, Editor, DiversityQ</p>					
17:45 - Networking Drinks					

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