

 FOXON MEDIA

PRESENTS

TSAMLONDON



1st May, 2024

The London Stadium

Stratford, London E20 2ST United Kingdom

tsam.foxonmedia.com/london

Welcome to TSAM London

Foxon Media is delighted to once again gather the leading asset management firms from the UK and beyond at TSAM London in May 2024 as we celebrate over two decades of successfully connecting industry leaders to learn and collaborate through our platform.

TSAM is a world-class global event series with a presence in UK, Europe, North America, and Asia; as our largest and flagship event, TSAM London unites regional investment professionals and solutions providers to help them succeed in driving front, middle and back-office operations.

The event agenda has been researched extensively in close association with asset management leaders as well as forward-thinking solution providers, ensuring that attendees leave with valuable insights on the most pressing issues to help inform their decision making and business strategies.

With five jam-packed streams of keynote presentations, panel discussions, and fireside chats, as well as a full-scale exhibition area and networking drinks reception, TSAM London is an immersive, one-stop-shop for all investment professionals to gather, learn, and engage.

We look forward to welcoming you back at TSAM London in 2024.

The event will offer an in-depth look into the following areas:

- Investment Operations & Data
- Technology and Automation
- Performance & Risk
- Regulation & Compliance
- Marketing and Client Services



Siobhan Clarke
Chief Operations Officer
Investments and Distribution
Royal London Asset Management RLAM



Anna Colombatti
Investment COO
and Head of Research
AXA IM Select



Lucia Pino-Garcia
Chief Technology Officer
Ninety One



Paul Vandenberghe
Chief Operating Officer
Black Ark Capital



Duncan Cooper
Chief Data Officer
Asset Servicing
Northern Trust



Sujan Nadarajah
Chief Compliance Officer
TwentyFour Asset Management



Ankush Jain
Chief Investment Officer & Co-founder
Aaro Capital



Phillip Chapple
Chief Operating Officer
Monterone Partners LLP



Sachin Anandikar
Chief Technology Officer
Pemberton Asset Management



Matthew Edgar
Chief Technology Officer
Slate Asset Management



Peter Spiller
Chief Investment Officer
CG Asset Management



Anji Kang-Stewart
Global Head of Marketing
Man Group



Celia Fraser
Emerging Capabilities Lead
Capital Group



Salim Mansoor
Global Head of Investor
Alternatives Compliance
Allianz Global Investors



Richard Spencer
Global Head of Investor
Insights Technology
J.P. Morgan Asset Management



Sally Bashuan
Executive Director -
Head of Data Governance
Federated Hermes Limited



Richard Bruckshaw
Head of Investment
Technology
Schroders



Stephanie Clarke
Head of Strategic Change
Pictet Asset Management



Manuel Silva Martinez
General Partner
Mouro Capital



Andrew Garnett
Head of Compliance
Royal London Asset Management



Darryl Cornelius
Head of Business
Regulatory Change
State Street Global Advisors



Ian Robinson
Head of Data Production
Services
Legal & General Investment Management (LGIM)



Shelley Mussett
Head of Distribution
Technology
Ninety One



James Marsden
Head of Distribution and
Funds Compliance
abrdn



Tom Cunningham
Head of Investment
Operations
Hargreaves Lansdown



Neil Colquhoun
Head of MAFI
Investment Services
Baillie Gifford & Co



Adrian Whelan
Head of Market
Intelligence Group
Brown Brothers Harriman



Neville Vyas
Head of Marketing
Europe & APAC
Impax Asset Management



Boyan Filev
Head of Quantitative
Alpha Strategies
abrdn



Kassie Siwo-Gasa
Head of Digital Marketing,
Digital Platforms and
Data Enablement
Legal & General Investment Management (LGIM)



Simone Guidi
Head of Investment Risk
JO Hambro Capital Management



Terrance Turner
UK Head of Compliance
AXA Investment Managers UK



Mark Austin
Principal,
Head of Trade Support
Connor, Clark & Lunn Financial Group



Mark Bird
Head of Data Risk and
Compliance
Legal & General Investment Management LGIM



Pierre Lequeux
Managing Director -
Head of Investments
Millennium Global



Nirav Shah
Senior Executive Director,
Quant & ESG Engineering
J.P. Morgan Asset Management



George Vakalopoulos
Head of Regulatory
Developments &
Thematic Reviews
AXA Investment Managers UK



Emma MacDowall
Managing Director, Global Head of
Regulatory Change Management
Manulife Investment Management



Siân Kelly
Global Market Consulting &
Counterparty Risk Specialist
Capital Group



James Purdie
Partner & Head of
Investor Relations
Arion Investment Management Limited



Cornelia Frentz
Director Governance and
Sustainable Investing
European Circular Bioeconomy Fund (ECBF)



John Lund
Director
JXL Consulting



Jonathan Hammond
Partner, Consulting Division
- Asset and Wealth
Management
Davies



Adam Grainger
Founder and
Managing Director
Accomplish



Mikkel Bates
Regulation Manager
FE fundinfo



Keith Viverito
Managing Director
of EMEA and APAC
Clearwater Analytics



Caroline Lubbock
Principal Consultant
Schroders



Chris Barrow
Head of Arcesium Europe
Arcesium



Da Wei
Founder & Chief
Executive Officer
Orbit Financial Technology



Damian Handzy
Managing
Director - Analytics
Confluence



Neil Thornburn
Chief Experience Officer
Kurtosys



Nick Dekker
Senior Partner
AlphaFMC Group



Saurav Gupta
Data Platform Team Lead
InterSystems



Ashish Aryal
Strategy Director
SimCorp



Bilal Khan
Strategic Enablement, Global
Investment Operations
Vanguard



Helen Pugh
Director,
Head of Marketing EMEA
KKR



Jamie Stevenson
Head of the Data
Management Office
Insight Investments



Sanchari Roy
Marketing Manager for Global
Banks, Benelux & Nordics
Allianz Global Investors



Stephen Tait
Product Manager
Finbourne



Adam Scott
Director, Corporate Actions
S&P Global Market Intelligence



Gary Hoberman
Founder and CEO
Unqork



Matthew Smith
Head of Insurance Clients
abrdn



Ruby Paramanathan
Director
Baringa



Guy Metrick
Industry Vice President -
Financial Services
Applan



Jonathan Avery
Head of Platform Technology
and Change
Legal & General Investment Management (LGIM)



Mark Underdown
Enterprise Sales Director -
RWS Linguistic AI
RWS



Ravi Gandhi
Senior Specialist
FactSet



Virginie O'Shea
Founder and Chief Executive
Firebrand Research



Erik Vynckier
Board and Audit Risk
Compliance Member
Foresters Friendly Society



Grant Swart
Head Of Product
Kurtosys



Olga Romanova
Independent consultant



Patrick McKenna
Chief Commercial Officer
Kurtosys



Yiannis Bartzilas
Director, ESG
Muznich & Co.



Devendra Bhudia
Executive Director,
EDM, Enterprise Solutions
S&P Global Market Intelligence



Niamh Fenton
Portfolio Construction
& Research Analyst
Fidelity International



Paul Taylor
Independent Consultant



Bernardo Castel-Branco
Partner, Head of Alpha's UK
Regulatory Compliance and
Risk Practice
Alpha FMC



Colin Bennett
Global Head of Marketing
& Client Experience
GAM Investments



Daniel Balla
Head of Data Technology
T Rowe Price



David Butcher
Managing Director and
Founder
Communications and Content



Deon Pillay
Head of Marketing
Technology Enablement
and Governance
LGIM



Guido Frederico
Head of Open Ended Product
and Operations Americas and
Europe
Apex Group Ltd



Rachael Rowe
RVP Sales
Seismic



Sharon Wilson
Head of Investment & Product
Management Support
Schroders



Constantine Belous
Head of Quantitative
Development
Orchard Global Asset Management



Nabil Cherrat
Head of ALTO Investment
Product Strategy
Amundi Technology



Sally Orriss
European Distribution
Business Services
Fidelity International

08:00 – 08:50 Registration - Sponsored by **FIRT FINANCIAL RECOVERY TECHNOLOGIES**

Sponsored by **KURTOSYS**

08:20 – 09:00 – Kurtosys Hosted Roundtable Discussion – **BM6**
The future of client reporting

Host: Patrick McKenna, Chief Commercial Officer, Kurtosys

Investment Operations & Data Stream A The Forge	Technology & Automation Stream B The Forge	Performance & Risk Stream C The Arnold Hills	Regulation & Compliance Stream D The Arnold Hills	Marketing & Client Services Stream E The Royal East
Chair's Welcome Address Jonathan Hammond, Partner, Consulting Division - Asset and Wealth Management, <i>Davies</i>	Chair's Welcome Address Paul Taylor, Independent consultant	Chair's Welcome Address Damian Handzy, Managing Director – Analytics, <i>Confluence</i>	Chair's Welcome Address John Lund, Director, <i>JXL Consulting</i>	Chair's Welcome Address Neil Thornburn, Chief Experience Officer, <i>Kurtosys</i>
09:00 – 09:45 Panel Discussion Elevating the relationship between investment managers and service providers – From selection and integration to managing the full lifecycle Speakers: Phillip Chapple, Chief Operating Officer, <i>Monterone Partners LLP</i> Bilal Khan, Strategic Enablement – Global Investment Operations, <i>Vanguard</i> Chris Barrow, Head of Arcesium Europe, <i>Arcesium</i>	09:00 – 09:45 Panel Discussion Debunking the one size fits all myth – Deep diving into legacy systems integration and optimisation Speakers: Jonathan Avery, Head of Platform Technology and Change, <i>Legal & General Investment Management (LGIM)</i> Caroline Lubbock, Principal Consultant, <i>Schroders</i> Neil Colquhoun, Head of MAFI Investment Services, <i>Baillie Gifford & Co</i> Ashish Aryal, Strategy Director, <i>SimCorp</i>	09:00 – 09:30 Keynote Currency: Risk or opportunity? The changing nature of currency risk Speaker: Pierre Lequeux, Managing Director - Head of Investments, <i>Millennium Global</i>	09:00 – 09:30 Keynote Approaching interoperability globally – Mitigating regulatory risk with enhanced monitoring tools Speaker: Emma MacDowall, Managing Director, Global Head of Regulatory Change Management, <i>Manulife Investment Management</i>	09:00 – 09:30 Keynote Creating value to unlock opportunities for growth – Making your client's needs a competitive advantage Speaker: Anji Kang-Stewart, Global Head of Marketing, <i>Man Group</i>
09:45 – 10:00 Audience Poll Share your thoughts on investment operations trends, optimising data management processes, and other new challenges on the horizon!	09:45 – 10:00 Audience Poll Share your thoughts on how technology is shaping the industry, revolutionising workflows, and impacting job roles!	09:30 – 10:00 Fireside chat T+1 settlements – Fireside chat with Cognito and Northern Trust	09:30 – 10:00 Presentation Building Trust Through Transparency: ACT Speaker: Mandy Kirby, Co-Chief Executive, <i>City Hive</i>	09:30 – 10:00 Presentation Readability: Marketing opportunity, compliance challenge? Speaker: David Butcher, Managing Director and Founder, <i>Communications and Content</i>

10:00 – 10:45 Morning Networking Break - Sponsored by **Arcadium**

10:45 – 11:30 Panel Discussion T+1 settlement transition – What is the operational impact in the UK of optimising post-trade processing capabilities? Speakers: Siân Kelly, Global Market Consulting & Counterparty Risk Specialist, <i>Capital Group</i> Stephanie Clarke, Head of Strategic Change, <i>Pictet Asset Management</i> Mark Austin, Principal, Head of Trade Support, <i>Connor, Clark & Lunn Financial Group</i>	10:45 – 11:30 Panel Discussion Optimising workflows through digital-first mindsets – Minimising human errors and streamlining automation for enhanced cost-control Speakers: Lucia Pino-Garcia, Chief Technology Officer, <i>Ninety One</i> Guy Mettrick, Industry Vice President - Financial Services, <i>Applan</i> Matt Edgar, Chief Technology Officer, <i>Slate Asset Management</i> Saurav Gupta, Data Platform Team Lead, <i>InterSystems</i> Guido Frederico, Head of Open-Ended Product and Operations: Americas and Europe, <i>Apex Group Ltd.</i>	10:45 – 11:30 Panel Discussion Taking advantage of turning tides – Leaning on active management, diversification strategies and risk management Speakers: Boyan Filev, Head of Quantitative Alpha Strategies, <i>abrdn</i> Adrian Whelan, Head of Market Intelligence Group, <i>Brown Brothers Harriman</i> Ankush Jain, Chief Investment Officer & Co-founder, <i>Aaro Capital</i> Niamh Fenton, Portfolio Construction & Research Analyst, <i>Fidelity International</i>	10:45 – 11:30 Panel Discussion Ensuring compliance under Consumer Duty – Delivering fair value and price transparency Speakers: Terrance Turner, UK Head of Compliance, <i>AXA Investment Managers UK</i> Andrew Garnett, Head of Compliance, <i>Royal London Asset Management</i> Bernardo Castel-Branco, Partner, Head of Alpha's UK Regulatory Compliance and Risk Practice, <i>Alpha FMC</i>	10:45 – 11:30 Panel Discussion Honing in on product innovation and robust distribution channels – How market consolidation is reshuffling marketing strategies Moderator: Neil Thornburn, Chief Experience Officer, <i>Kurtosys</i> Speakers: James Purdie, Partner & Head of Investor Relations, <i>Arian Investment Management Limited</i> Sanchari Roy, Marketing Manager for Global Banks, Benelux & Nordics, <i>Allianz Global Investors</i> Colin Bennett, Global Head of Marketing & Client Experience, <i>GAM Investments</i>
11:30 – 12:00 Sponsored Session 'The Specialist Asset Manager': A View through the Operational Lens Moderator: Nick Dekker, Senior Partner, <i>AlphaFMC Group</i> Speakers: Paul Vandenberghe, Chief Operating Officer, <i>Black Ark Capital</i> Duncan Cooper, Chief Data Officer Asset Servicing, <i>Northern Trust</i>	11:30 – 12:00 Sponsored Session Corporate Actions: Unlocking Potential through Automation and Accelerated Change Speaker: Adam Scott, Director, Corporate Actions, <i>S&P Global Market Intelligence</i>	11:30 – 12:00 Fireside Chat Establishing an investment risk framework that absorbs and incorporates geopolitical shocks through forward looking stress testing Speaker: Simone Guidi, PAM Head of Investment Risk, <i>J O Hambro Capital Management</i>	11:30 – 12:00 Sponsored Session Adapting to the Tide: Navigating Through Global Regulatory Reforms and Strategies for Compliance Speakers: Guy Mettrick, Industry Vice President - Financial Services, <i>Applan</i> Virginie O'Shea, Founder and Chief Executive, <i>Firebrand Research</i>	11:30 – 12:00 Presentation The Accomplish Quiz: 5 behavioral facts and why they matter to client retention Speakers: Adam Grainger, Founder and MD, <i>Accomplish</i> Matthew Smith, Head of Insurance Clients, <i>abrdn</i> Ruby Paramanathan, Director, <i>Baringa</i>
12:00 – 12:30 Fireside Chat Recent trends in operational due diligence – What are the institutional investors looking for? Speaker: Olga Romanova, Independent Consultant	12:00 – 12:30 Panel Discussion Unify and Simplify Content Creation: Streamline and accelerate content production for fact sheets, commentaries, pitchbooks and quarterly investment reports – without sacrificing accuracy or quality Moderator: Rachael Rowe, RVP Sales, <i>Selsmic</i> Speakers: Deon Pillay, Head of Marketing Technology Enablement and Governance, <i>Legal & General Investment Management LGIM</i> Sally Orriss, European Distribution Business Services, <i>Fidelity International</i> Sharon Wilson, Head of Investment & Product Management Support, <i>Schroders</i>	12:00 – 12:30 Fireside Chat Rethinking portfolio construction and risk assessment – Is the 60/40 rule still fit for purpose and what do the new approaches look like? Speaker: Peter Spiller, Chief Investment Officer, <i>CG Asset Management</i>	12:00 – 12:30 Presentation Preparing for changes in sustainability and other regulatory fund disclosures in the UK and EU Speaker: Mikkel Bates, Regulation Manager, <i>FE Fundinfo</i>	12:00 – 12:30 Fireside Chat Modernizing Client Experiences with Codeless Moderator: Nick Dekker, Senior Partner, <i>AlphaFMC Group</i> Speaker: Gary Hoberman, Founder and CEO, <i>Unqork</i>

12:30 – 14:00 Lunch Break

14:00 – 14:45 Panel Discussion Implementing a company-wide data sharing culture – Tearing down data silos to improve operations and optimise revenue Speakers: Ian Robinson, Head of Data Production Services, <i>Legal & General Investment Management (LGIM)</i> Jamie Stevenson, Head of the Data Management Office, <i>Insight Investments</i> Ravi Gandhi, Senior Specialist, <i>FactSet</i> Devendra Bhudia, Executive Director, EDM, Enterprise Solutions, <i>S&P Global Market Intelligence</i> Sally Bashuan, Executive Director - Head of Data Governance, <i>Federated Hermes Limited</i>	14:00 – 14:45 Panel Discussion Mastering cloud migration – How can a seamless transition elevate operations and drive profits upwards? Speakers: Keith Viverito, Managing Director of EMEA and APAC, <i>Clearwater Analytics</i> Tom Cunningham, Head of Investment Operations, <i>Hargreaves Lansdown</i> Daniel Balla, Head of CDO Technology, <i>T Rowe Price</i> Constantine Belous, Head of Quantitative Development, <i>Orchard Global Asset Management</i> 14:00 – 14:45 - SS&C Invitation Only Workshop in room BM6 Empowering Teams through Next-Generation Technologies: How can the latest tech platforms and tools transform your operating model to empower teams to focus on value add tasks by automating and streamlining repetitive processes	14:00 – 14:45 Panel Discussion Deploying AI & Gen AI capabilities in investment decision-making – Reshaping revenue generation and risk mitigation Speakers: Nirav Shah, Senior Executive Director, Quant & ESG Engineering, <i>J.P. Morgan Asset Management</i> Richard Bruckshaw, Head of Investment Technology, <i>Schroders</i> Da Wei, Founder & Chief Executive Officer, <i>Orbit Financial Technology</i> Nabil Cherrat, Head of ALTO Investment Product Strategy, <i>Amundi Technology</i>	14:00 – 14:45 Panel Discussion SDR labelling regime for sustainable investment – Navigating the product landscape and enhancing consumer trust Moderator: Virginie O'Shea, Founder and Chief Executive, <i>Firebrand Research</i> Speakers: Sujan Nadarajah, Chief Compliance Officer, <i>TwentyFour Asset Management</i> George Vakilopoulos, Head of Regulatory Developments & Thematic Reviews, <i>AXA Investment Managers UK</i> Salim Mansoor, Global Head of Alternatives Compliance, <i>Allianz Global Investors</i> James Marsden, Head of Distribution and Funds Compliance, <i>abrdn</i>	14:00 – 14:45 Panel Discussion Upskilling and reskilling in a data literate and tech-driven industry – How are the sales and marketing functions evolving? Moderator: Patrick McKenna, Chief Commercial Officer, <i>Kurtosys</i> Speakers: Shelley Mussett, Head of Distribution Technology, <i>Ninety One</i> Celia Fraser, Emerging Capabilities Lead, <i>Capital Group</i> Kassie Siwo-Gasa, Head of Digital Marketing, Digital Platforms and Data Enablement, <i>Legal & General Investment Management LGIM</i>
14:45 – 15:15 Fireside Chat Innovating investment processes through data driven insights – What are the tools and platforms that can elevate your business? Speakers: Tom Cunningham, Head of Investment Operations, <i>Hargreaves Lansdown</i> Stephen Tait, Product Manager, <i>FINBOURNE Technology</i>	14:45 – 15:15 Fireside Chat Designing a strategic roadmap to tackle data fragmentation – Consolidating the data governance journey through automation Speakers: Sachin Anandikar, Chief Technology Officer, <i>Pemberton Asset Management</i> Mark Bird, Head of Data Risk and Compliance, <i>Legal & General Investment Management LGIM</i>	14:45 – 15:15 Presentation Performance measurement and risk management in private assets – Framework and techniques Speaker: Erik Vynckier, Board and Audit Risk Compliance Member, <i>Foresters Friendly Society</i>	14:45 – 15:15 Fireside Chat Meeting reporting demands – Leveraging data and technology to fulfil complex, multi-jurisdictional regulatory requirements Speaker: Darryl Cornelius, Head of Business Regulatory Change, <i>State Street Global Advisors</i> Mark Underdown, Enterprise Sales Director – RWS Linguistic AI, <i>RWS</i>	14:45 – 15:15 Fireside Chat Striking the perfect balance – Crafting a global marketing strategy that harmonises brand consistency and local relevance Moderator: Neil Thornburn, Chief Experience Officer, <i>Kurtosys</i> Speakers: Neville Vyas, Head of Marketing Europe & APAC, <i>Impax Asset Management</i> Helen Pugh, Director, Head of Marketing EMEA, <i>KKR</i>

15:15 – 16:00 Afternoon Networking Break - Sponsored by **Arcadium**

16:00 – 16:30 Fireside Chat Enhancing operational efficiencies by customizing data platforms through third – party collaboration Speaker: Tom Cunningham, Head of Investment Operations, <i>Hargreaves Lansdown</i>	16:00 – 16:30 Fireside Chat Improving foresight and personalisation with AI and Gen AI – Utilising predictive capabilities to optimise portfolio and generation Speakers: Richard Spencer, Global Head of Investor Insights Technology, <i>J.P. Morgan Asset Management</i> Anna Colombatti, Investment COO and Head of Research, <i>AXA IM Select</i>	16:00 – 16:30 Panel Discussion Bringing investment and sustainability under one umbrella – Identifying green investment opportunities and measure the associated growth and performance Speakers: Yiannis Bartzilas, Director, ESG, <i>Muzinich & Co.</i> Cornelia Frentz, Director Governance and Sustainable Investing, <i>European Circular Bioeconomy Fund (ECBF)</i> Manuel Silva Martinez, General Partner, <i>Mouro Capital</i>	16:00 – 16:30 Fireside Chat Harmonising ETFs regulations between UK & EU post-Brexit – What's at stake for ETFs issuers and cross-border operations? Speaker: Eliza Ruddy, Head of ETF Platform Development, <i>Legal & General Investment Management (LGIM)</i>	16:00 – 16:30 Fireside Chat Providing a seamless digital experience and self-service capabilities – Developing a differentiated client portal and breaking ties with traditional reporting cycles Moderator: Grant Swart, Head Of Product, <i>Kurtosys</i> Speaker: Siobhan Clarke, Chief Operations Officer Investments and Distribution, <i>Royal London Asset Management RLAM</i>
--	--	--	---	--

16:30 Drinks Reception - Sponsored by **ENVESTNET**



FEATURING



LONDON | NEW YORK | BOSTON | TORONTO | SINGAPORE

Contact us:

For more information on any
of our products please contact:



Sponsorship:

Yahya Khan

Partnership Manager

yahya@foxonmedia.com



Content:

Okako Djambleka

Senior Content Producer

okako@foxonmedia.com



Ana Luiza Olanescu

Senior Content Producer

ana@foxonmedia.com



Marketing:

Kadin Luong

Marketing Director

kadin@foxonmedia.com