

The logo features a stylized 'FI' in a square on the left, with 'Fixed Income' in large black text, 'LEADERS SUMMIT' in orange text, and 'VIRTUAL BOARDROOM' in large black text below it.

Fixed Income LEADERS SUMMIT VIRTUAL BOARDROOM

*An exclusive, invitation-only forum taking place under the Chatham House Rule
for Buy Side Fixed Income Leaders to Benchmark their Responses and Solutions to the COVID-19 Crisis*

23rd March 2021 – Digitally Delivered

“I enjoyed the FILS Virtual Boardroom, especially the intimate Buy-side only Think Tanks. The format works really well and it is a good way of reaching a lot of people to discuss relevant topics.”

Mikael Bjorkman, Head of Execution Fixed Income, **Credit Suisse**

“Many thanks for organising a great event. It was one of the best virtual conferences I attended so far and I really enjoyed the experience.”

Alexander Giese, Head of Quant Trading, **UniCredit**

How will FILS Virtual Boardroom benefit you?

- ✓ **Private peer-to-peer benchmarking discussions:** Connect directly with your peers via small-group video-conferences on lessons-learnt following the Covid-19 crisis
- ✓ **Join virtual discussion groups with key solutions providers:** Pre-scheduled audio or video-conference calls with your chosen provider and a limited number of peers to evaluate strategic solutions to Covid-19 challenges
- ✓ **Secure and exclusive:** Taking place under Chatham House Rule so you can openly discuss key challenges posed by Covid-19 with your buy side peers using a secure video-conferencing and meetings platform



CONNECTING YOU TO MORE SENIOR LEADERS THAN ANYONE ELSE

Meet top players in the industry, and learn from those who have been there, done that and can show you how to do it too



FOCUSED ON YOUR SPECIFIC NEEDS BETTER THAN ANY OTHER EVENT

An agenda based on extensive research to ensure every challenge and opportunity is addressed clearly and thoroughly

Buy Side Speakers:

- ✓ Yannig Loyer, Global Head of Trading, Securities Financing and Derivatives, **AXA Investment Managers**
- ✓ Andy Falco, Global Head of FX & Fixed Income Trading, **Fidelity International**
- ✓ Jatin Vara, Head of International Trading & Global Head of Emerging Markets Trading, **BlackRock**
- ✓ Giulia Pellegrini, Deputy CIO - Emerging Markets Fixed Income, Portfolio Management & ESG, **Allianz Global Investors**
- ✓ Daniel Leon, Global Head of Trading, Treasury Management and Global Solutions, **HSBC Asset Management**
- ✓ Karim Awenat, Head of European Fixed Income Trading, **Invesco**
- ✓ Cathy Gibson, Global Head of Trading, **Ninety One**
- ✓ Regina Borromeo, Senior Portfolio Manager, Director of Global Macro FI, **Robeco**
- ✓ Richard Collins, Senior Fixed Income Trader, **State Street Global Advisors**
- ✓ Nick Eisinger, Co-Head of Emerging Markets Active Fixed Income, **Vanguard**
- ✓ Archit Soni, Portfolio Manager and Trader, **Dimensional**
- ✓ Ziyad Rizkallah, EMEA Head of Credit Index Products, **Morgan Stanley**
- ✓ Rik Klerkx, Head of Portfolio Management, **Cardano**
- ✓ Stephanie Sanchez-Kuong, Portfolio Manager, **Enko Capital**
- ✓ Sven Rudolf, Head of Trading, Fixed Income, **Oddo BHF AM**

Sell Side and Technology Speakers:

- ✓ Jim Toffey, Chief Executive Officer, **LTX**
- ✓ David Nicol, CEO, **LedgerEdge**
- ✓ Lidia Treiber, Director, Research, **WisdomTree**
- ✓ Oliver Kroll, Managing Director, **BondIT Global**
- ✓ Vasiliki Pachatouridi, Head of EMEA iShares Fixed Income Strategy, **BlackRock**
- ✓ Louise Oliver, General Sales, International Fixed Income, **Tradeweb**
- ✓ Chioma Okoye, Managing Director, European Institutional Credit, **Tradeweb**
- ✓ Ruben Costa-Santos, Head of Multi-Asset Class Analytics, **Virtu**
- ✓ Michael Sparkes, Head of Business Development, Europe, **Virtu**
- ✓ Philip Galdi, VP, Head of Indices, **ICE Data Services**
- ✓ Alberto Ruiz-Sena, Senior Research Analyst, **ICE Data Indices**
- ✓ Paul Graham, Director, Sales Specialists, Pricing and Reference Data, **ICE Data Services**
- ✓ Paul Kaplan, Global Head of Credit, Equities, TRS, and Price Transparency, **Bloomberg L.P.**
- ✓ Lawrence Migliore, EMEA Head of Electronic Trading Solutions Sales, **Bloomberg L.P.**
- ✓ Ian Shea, Head of Fixed Income for Europe and Asia, **Jane Street**
- ✓ Dan Philip, Institutional Sales and Trading, **Jane Street**

Moderators and Track Chairmen:

- ✓ Christian Benson, Research Associate, **Aite Group**
- ✓ Naz Bunting, Independent Consultant
- ✓ Julia Streets, Founder & CEO, **Streets Consulting**
- ✓ David Saab, Serial Entrepreneur
- ✓ Aasif Sarigat, Former Head of Asset & Liability Management, **Secure Trust bank**

Sponsored by:



Bloomberg





FILS Virtual Boardroom

Buy Side Innovation Day, 23rd March 2021


ALL TIMES ARE IN CET

09.00 CET	Welcome Address and Chairperson's Opening Remarks: Irene Cerquaglia , Editorial Director, FILS
09.05 CET	Buy Side Head of Trading Keynote with live Q&A Future proofing your desk in light of new market trends: How can you leverage historical and live execution data and innovative technology to tap into new profitable trading opportunities in 2021 and beyond? Yannig Loyer , Global Head of Trading, Securities Financing and Derivatives, AXA Investment Managers Interviewer: Julia Streets , Founder & CEO, Streets Consulting
09.25 CET	Industry Panel Discussion with live Q&A *OPEN TO BUY SIDE ONLY* How can the fixed income community improve collaboration to enhance liquidity opportunities and ultimately boost portfolio performance to meet end clients' needs? Karim Awenat , Head of Fixed Income Trading, Invesco Asset Management Sven Rudolf , Head of Trading, Fixed Income, Oddo BHF AM Louise Oliver , General Sales, International Fixed Income, Tradeweb Moderator: Chioma Okoye , Managing Director, European Institutional Credit, Tradeweb
09.55 CET	Buy Side Investment Keynote with live Q&A How are current macro-economic events impacting the fixed income market, and how can you leverage technology in your investment and execution strategy to boost performance? Regina Borromeo , Senior Portfolio Manager, Director of Global Macro FI, Robeco Oliver Kroll , Managing Director, BondIT Global Interviewer: David Saab , Serial Entrepreneur
10.15 CET	Fireside Chat with live Q&A The rise of EU bonds amid a global crisis: How is the investor community reacting to the EU's new stimulus measures and how will it impact your fixed income portfolios? Rik Klerkx , Head of Portfolio Management, Cardano

	Lidia Treiber, Director, Research, WisdomTree	
10.40 CET	Track A: EXPLORING THE LATEST LIQUIDITY INITIATIVES Track Chairperson: Naz Bunting, Independent Consultant	Track B: LEVERAGING INNOVATIVE DATA AND WORKFLOW TECH Track Chairperson: Christian Benson, Research Associate, Aite Group
	Interview with Live Polling Evaluating the most exciting liquidity initiatives of 2021: Which trading protocols should you be evaluating now, to maximise your access to liquidity in turbulent markets? Cathy Gibson, Global Head of Trading, Ninety One Interviewer: Naz Bunting, Independent Consultant	Interview Determining the current buy side wish list for analytics and trading technology: Which innovations are best suited to your fixed income desk? Daniel Leon, Global Head of Trading, Treasury Management and Global Solutions, HSBC Asset Management Interviewer: Christian Benson, Research Associate, Aite Group
11.00 CET	ETFs BOARDROOM How are ETFs transforming bond markets and revolutionising fixed income trading for the buy side? Jatin Vara, Head of International Trading & Global Head of Emerging Markets Trading, BlackRock Ziyad Rizkallah, Global Co-Head of Structured Credit, Morgan Stanley Vasiliki Pachatouridi, Head of EMEA iShares Fixed Income Strategy, BlackRock Host:  *OPEN TO BUY SIDE ONLY*	DATA ANALYTICS INNOVATION BOARDROOM The impact of innovations in Analytics and O/EMS technology: How can the buy side leverage data analytics to improve execution efficiency in an integrated way with each firm's unique trading workflow? Ruben Costa-Santos, Head of Multi-Asset Class Analytics, Virtu Michael Sparkes, Head of Business Development, Europe, Virtu Host:  *OPEN TO BUY SIDE ONLY*

11.40 CET	Coffee Break	Speed Networking – Top Holiday Destinations post Covid-19? <i>Join this virtual speed networking session to break the ice and spark new connections with your peers. Spend 3 minutes in a virtual Zoom room with 2 of your industry colleagues to share where's your top destination post-Covid 19 before moving into the next Zoom room. You will join three different rooms in total to meet with all the delegates before the content begins.</i>
11.50 CET	Interview with live Q&A Creating an ESG and Impact Investing framework: How can you best bridge the gap between asset allocation and execution in your ESG portfolio strategies to better meet your end investors' sustainability goals? Giulia Pellegrini , Deputy CIO - Emerging Markets Fixed Income, Portfolio Management & ESG, Allianz Global Investors Interviewer: Aasif Sarigat , Former Head of Asset & Liability Management, Secure Trust bank	
12.10 CET	Track A: EXPLORING THE LATEST LIQUIDITY INITIATIVES	Track B: LEVERAGING DATA AND TECH TO BOOST WORKFLOW EFFICIENCIES
	Interview How is the current evolving market structure and an increasing number of new market entrants redefining the way you interact with liquidity providers? Richard Collins , Senior Fixed Income Trade, State Street Global Advisors Interviewer: Naz Bunting , Independent Consultant	Interview with live Q&A and Polling Systematic vs. discretionary trading: How can you balance embracing an automated and data-driven vs an in-depth analytical approach on your desk to boost your overall investment performance? Karim Awenat , Head of European Fixed Income Trading, Invesco Interviewer: Christian Benson , Research Associate, Aite Group
12.30 CET	NEW PLATFORMS AND PROTOCOLS BOARDROOM Moving beyond RFQ in a MiFID II world: How can you embrace the latest developments in platforms and protocols to increase your access to liquidity and enhance your workflow efficiency? Jim Toffey , Chief Executive Officer, LTX Host:	PORTFOLIO TRADING BOARDROOM Construction, communication and execution: How can the Buy Side reap the benefits of portfolio trading? Paul Kaplan , Global Head of Credit, Equities, TRS, and Price Transparency, Bloomberg L.P. Lawrence Migliore , EMEA Head of Electronic Trading Solutions Sales, Bloomberg L.P. Host:

	 <p>*OPEN TO BUY SIDE ONLY*</p>	 <p>*OPEN TO BUY SIDE ONLY*</p>
13.10 CET	Lunch Break	
	Track A: EXPLORING THE LATEST LIQUIDITY INITIATIVES	Track B: LEVERAGING DATA AND TECH TO BOOST WORKFLOW EFFICIENCIES
14.10 CET	<p>LEDGER TECHNOLOGY BOARDROOM How can distributed ledger technology support the future of trading with control, clarity and access to latent liquidity? Andy Falco, Global Head of FX & Fixed Income Trading, Fidelity International David Nicol, CEO, LedgerEdge</p> <p>Host:</p>  <p>*OPEN TO BUY SIDE ONLY*</p>	<p>FASTER TIME TO MARKET BOARDROOM Achieving faster time to market in a complex data-driven world: How can asset managers bring new products to market quickly, and how can they best understand potential returns and risks of more diverse and complex investment strategies?</p> <p>Philip Galdi, VP, Head of Indices, ICE Data Services Alberto Ruiz-Sena, Senior Research Analyst, ICE Data Indices Paul Graham, Director, Sales Specialists, Pricing and Reference Data, ICE Data Services</p> <p>Host:</p>  <p>*OPEN TO BUY SIDE ONLY*</p>

14.50 CET	Coffee Break		
15.00 CET	Interview with live Q&A and Polling Tapping into the most profitable fixed income emerging markets investment opportunities: How should you factor them into your investment decisions to increase performance and better manage risks? Nick Eisinger , Co-Head of Emerging Markets Active Fixed Income, Vanguard Stephanie Sanchez-Kuong , Portfolio Manager, Enko Capital Interviewer: David Saab , Serial Entrepreneur		
15.20 CET	Track A: EXPLORING THE LATEST LIQUIDITY INITIATIVES		Track B: LEVERAGING DATA AND TECH TO BOOST WORKFLOW EFFICIENCIES
	RELATIONSHIPS VS. TECH VIRTUAL BOARDROOM Liquidity in 2021 and beyond: How can you apply lessons learnt from a global pandemic to find the optimal balance between relationships vs. tech-driven decisions to better navigate uncertain markets? Ian Shea , Head of Fixed Income for Europe and Asia, Jane Street Dan Philip , Institutional Sales and Trading, Jane Street Host:  Jane Street *OPEN TO BUY SIDE ONLY*		Interview with live Q&A and Polling Succeeding with data aggregation: How can the industry better cooperate to achieve a consolidated tape that ensures greater data quality, operational efficiency and better demonstrate best execution? Archit Soni , Portfolio Manager and Trader, Dimensional Interviewer: Christian Benson , Research Associate, Aite Group
16.00 CET	Track Chairperson's Closing Remarks		15.40 CET Track Chairperson's Closing Remarks