

EFFAS SUMMER SCHOOL

3th – 5th July 2019



Programme

Wednesday, 3 July 2019

11:30 – 12:00 Registration

12:00 – 12:15 Welcome address

Mr. Domenico Aiello, CFO at Amundi, France

Dr. Jesús López Zaballos, EFFAS Chairman.

12:15 – 13:00 Panel Discussion

“Europe and the lesson from Brexit”

Mr. Andrew Garfield, Principal at Garfield Advisory Ltd., Great Britain.

Mr. Simon Nixon, Chief Leader Writer at The Times, Great Britain.

Moderator: Mr. Frank Klein, Managing Director at DWS. Board Member of the German Association of Financial Analysts (DVFA) Germany

13:00 – 14:00 Lunch

14:00 – 15:30 Key note

“Asset Management Trends and challenges”

Dr. Philipp Koch, Senior Partner at McKinsey & Co., Germany

Mr. Niklas Nolzen, Engagement Manager at McKinsey & Co, Germany

Followed by a panel discussion:

Ms. Muriel Faure, AMF Board member, France

Ms. Claire-Anne Perini, Head of Business Intelligence at Amundi, France.

Ms. Hortense Lacroix, Equity analyst and senior fund manager at Arbel.

Dr. Philipp Koch, Senior Partner at McKinsey & Co., Germany

Moderator: Mr. Frank Klein, Managing Director at DWS. Board Member of the German Association of Financial Analysts (DVFA) Germany

15:30 – 16:15 Conference

“The Euro area fixed income market”

Prof. Dr. Leef H. Dierks, Professor for Finance and International Capital Markets. Lübeck University of Applied Sciences, Germany.

16:15 – 16:45 Group Photo & Coffee Break

Wednesday, 3 July 2019

16:45 – 18:15 Key note and Panel discussion

“Capital Market Union: Quo vadis?”

Dr. Zoltan Bakay, Senior Researcher at Erste Group Bank AG, Austria

Mr. Eric Forest, Head of listing, EuroNext, France.

Mr. Jung Lichtenberger, Deputy Head of Unit at DG Financial Stability, Financial Services and Capital Markets Union, European Commission, Belgium.

Mr. Angelo di Pasquale, Co-head Fixed Income Desk at Equita SIM SPA, Italy.

Moderator: Prof. Dr. Leef H. Dierks, Professor for Finance and International Capital Markets. Lübeck University of Applied Sciences, Germany.

19:00 – 21:30 Welcome Dinner

Thursday, 4 July 2019

09:00 – 09:30 Key note

“Energy Transition”

Ms. Nadine Viel Lamare, Director at Transition Pathway initiative Sweden.

09:30 – 10:30 Panel Discussion

“Energy Transition and innovations”

Ms. Sonia Artuso, member of the Asset Allocation Team at Intesa Sanpaolo Private Banking and member of Sustainability Team at AIAF, Italy

Ms. Nadine Viel Lamare, Director at Transition Pathway initiative Sweden

Dr. Abdeldjellil Bouzidi, Consultant at Emena Advisory, France.

Mr. Jean Yves Wilmotte, Manager at Carbone4, France.

Moderator: Ms. Marie Pierre Peillon, Head of Research and ESG Strategy at Groupama AM, France

10:30 – 11:00 Coffee Break

11:00 – 11:30 Key note

“Sustainable Finance: European action plan”

Dr. Andreas G. F. Höpner, Member of EU TEG on Sustainable Finance. Professor of Operational Risk, Banking & Finance at University College Dublin (UCD), Ireland

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Programme

Thursday, 4 July 2019

11:30 – 12:45 Panel Discussion

“ESG and the transformation of asset management”

Ms. Elise Leclerc, Head of Social Impact Assessment Lab at ESSEC Business School, France.

Mr. Stanislas Pottier, Head of Responsible Investment at Amundi, France.

Mr. Alexandre Rambaud, Sustainable Accounting and Care at Agroparistech, EFRAG, Academic Network, France

Mr. Frank Klein, Managing Director at DWS, DVFA Board Member, Germany

Moderator: Mr. Jean Philippe Desmartin, Head of Responsible Investment at Edmond de Rothschild AM, EFFAS ESG co-chair, France.

12:45 – 13:15 EFFAS E-learning

“EFFAS certified ESG Analyst (CESGA®) “

Prof. Dr. Alexander Bassen, Academic Director of the CESGA® Programme. Professor of capital markets and management at the University of Hamburg, Faculty of Business, Economics and Social Science (Germany).

Mr. Lionel Pellicer, Vice-President of the SFAF and Co-founder of phiadvisor, France

13:15 – 14:15 Lunch

14:15 – 16:15 Key note & Panel Discussion

“Best Practices on Big data and Structured data”

Mr. John Turner, CEO at XBRL International, Great Britain.

Mr. Thanh-Long Huynh, CEO at Quantcube, France

Mr. Stéphane Voisin, Crowdvalue Founder, France.

Ms. Virginie Galas, Croci Group, DWS, France

Moderator: Mr. Hans Buysse, Partner at Clairfield Benelux. Board Member & Treasurer of EFFAS, Chairman of the Belgian Association of Financial Analysts (ABAF), Belgium.

16:15 – 16:45 Coffee Break

16:45 – 18:00 Show case

“Big data and Structured data”

Dr. Andreas G. F. Höpner, Member of EU TEG on Sustainable Finance. Professor of Operational Risk, Banking & Finance at University College Dublin (UCD), Ireland

Mr. Ralf Frank, Managing Director of the of the German Association of Financial Analysts (DVFA). Germany.

Friday, 5 July 2019

9:00 – 10:15 Panel discussion

“MiFiD II and regulation”

Ms. Barbara Cohen, Global Head of Credit Research at BNP Paribas. France

Ms. Amandine Cordier, Senior Policy Officer - Investor Protection and Intermediaries Team at ESMA, France.

Mr. Pierre-Yves Gauthier, CEO at Alpha Value, France.

Mr. Philippe Brossard, Head of Research AG2R La Mondiale Group, France.

Moderator: Mr. Bernard Coupez, Founder of Strategy & Regulation SAS, Belgium.

10:15 – 10:45 Coffee Break

10:45 – 12:00 Key note & panel discussion

“Talent Acquisition Today – Challenges for Employee and Employer”

Ms. Astrid Tostmann, Managing Director at Tostmann The Executive Finder GmbH, Germany

Ms. Allison Jobbins, Head of Human Resources for Investment division, at Amundi, Ireland.

Moderator: Mr. Frank Klein, Managing Director at DWS, DVFA Board Member, Germany

12:00 – 12:30 Key note

“EFFAS: Future initiatives for European investment professionals”

Dr. Manuel Puerta, Executive Board Member at BPI Asset Management, Board Member of EFFAS, Chairman of the Portuguese Association of Financial Analysts (APAF), Portugal

12:30-13:00 Closing session

Mr. Anthony Mellor, Head of Financial Communication & Investor Relations at Amundi, France.

Mr. Thierry Giami, SFAF Chairman, France.

13:30 – 14:30 Closing Cocktail