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CONFERENCES

Informing Pension Funds

Annual Round Up & Current Investment Issues for Pension Funds

Thursday 9 November 2017
at Le Meridien, Piccadilly, London

Sponsored by:

AMX
Aon Hewitt
Deutsche Asset Management
Insight Investments
Old Mutual Global Investors
P-Solve
Royal London Asset Management

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This conference is
arranged by SPS Conferences

www.spsconferences.com
CPD = 6.5 hours



- 08.30 **Registration and coffee**
- 09.00 **Welcome and Opening Remarks**
FRED JAFFE, EXECUTIVE DIRECTOR, SPECIALIST PENSION SERVICES
- 09.10 **Session 1: Annual Review & An Alternative Approach**
 MODERATOR: **CLAIRE ALTMAN**, CLIENT DIRECTOR, CAPITAL CRANFIELD
- A Year in Review**
 Bullets TBC
SPEAKER TO BE CONFIRMED, AON HEWITT
- Disruption: The Future of the Asset Management Industry**
 The current institutional asset management model is inefficient. Innovation and centralisation strategies have transformed other industries. There is no reason why we shouldn't challenge how the investment industry is currently organised to fundamentally transform institutional investment for the benefit of the end saver.
JIGNASA PATEL, HEAD OF CLIENT RELATIONS, AMX
- 10.25 **Coffee / Tea**
- 10.55 **Session 2: Fixed Income Opportunities**
 MODERATOR: **TO BE CONFIRMED**
- Opportunities in Multi Sector Fixed Income**
 Structural changes in macroeconomics, geopolitics and markets are providing unconstrained bond investors with a range of opportunities. This session will look at how to capitalise on this investment landscape through unconstrained absolute and relative-return fixed income strategies.
MARK NASH, HEAD OF GLOBAL BONDS, OLD MUTUAL GLOBAL INVESTORS
- A Multi-Facet Approach to Multi Asset Credit**
 The past 18 months have shown that fixed income volatility is now a fact of investing life. But what did it mean for the relatively new world of multi-asset credit, and what expectations can we form for the future? Multi-asset credit is seen as part of the solution to maintain attractive income while reducing or managing that volatility. This session explains why the credit cycle is important in framing the risks but equally how credit selection is essential to creating a resilient portfolio.
AZHAR HUSSAIN, HEAD OF GLOBAL HIGH YIELD, ROYAL LONDON ASSET MANAGEMENT
- 12.10 **Drinks and Lunch**
- 13.20 **Other Opportunities**
 MODERATOR: **MIKE CLARK**, NON-EXECUTIVE DIRECTOR, BRUNEL PENSIONS PARTNERSHIP AND FOUNDER & DIRECTOR, ARIO CONSULTING
- Developments in Liquidity Markets: Meeting the Needs of Pension Funds**
 Changes in money market regulation. The impact on liquidity funds. Innovations that can help investors address the liquidity challenges
ANDY BURGESS, PRODUCT SPECIALIST, CLIENT SOLUTIONS GROUP, INSIGHT INVESTMENTS
- The New World Order for ESG Investing: Trends and Prospects**
 Bullets TBC
SPEAKER TBC, DEUTSCHE ASSET MANAGEMENT
- 14.35 **Coffee / Tea**
- 15.00 **A Look into the Future and Pension Fund Insights**
 MODERATOR: **ALAN PICKERING**, CHAIR, THE PLUMBING INDUSTRY PENSION SCHEME
- 2018 and Beyond**
 Macro and economic outlook; Current asset class positioning for our clients; Market trends in fiduciary management
BARBARA SAUNDERS, MANAGING DIRECTOR, P-SOLVE
- A panel of pension scheme executives and trustees will talk about their pension fund's investment strategies and experiences. Panelists to include:
ALAN PICKERING, CHAIR, THE PLUMBING INDUSTRY PENSION SCHEME
- 16.15 **Drinks reception followed by Close of Conference**

Speaker bios



Andy Burgess joined **Insight** in August 2014 as a fixed income Product Specialist. Andy joined Insight from GE Asset Management (GEAM) where he was a portfolio manager responsible for managing the Euro Fixed Income Fund. Prior to this, he held various portfolio manager roles at GEAM's predecessor companies. He started his investment management career in 1997 at National Mutual Life as an assistant portfolio manager, with a focus on Far East equities. Andy graduated from the University of Bristol with a BSc in Economics and Economic History and is an Associate of the CFA Society of the UK.



Azhar Hussain joined **RLAM** in May 2012 as Head of Global High Yield. Azhar has 21 years' experience of the financial industry. Before joining RLAM he was at Insight Investment Management as Head of High Yield and Leveraged Loans, and the manager of a number of high yield credit funds, including contributing to the high yield component of the Absolute Insight Credit Fund. Prior to Insight, he worked at Gulf International Bank (GIB) in London, specialising in global high yield. He joined GIB in 2001 as an analyst, before assuming his first portfolio management role two years later and subsequently establishing a high yield team. Azhar began his career at Deloitte & Touche in 1996, where he qualified as a Chartered Accountant. Azhar has a BA in Economics and Law from the University of London (School of Oriental & African Studies).



Mark Nash joined **Old Mutual Global Investors** as Head of Global Bonds and Lead Manager of the Old Mutual Global Strategic Bond Fund in June 2016. He previously worked at Invesco Asset Management since 2001, most recently as head of global multi-sector portfolio management and head of European fixed income strategy. Prior to that he held a number of roles at Invesco including, head of global macro alpha sources and senior fund manager. Mark is a CFA charterholder.



Jignasa Patel leads the development and management of the relationship between **AMX** and new clients. Jignasa joined Willis Towers Watson in 2006 as a dedicated manager researcher. Jignasa has over 16 years' experience in financial markets leading on manager research ideas and working with clients to advise on broader manager portfolios. Prior to joining Willis Towers Watson, Jignasa worked for Mercer Investment Consulting



Barbara Saunders has overall responsibility for client engagement with **P-Solve**, focusing on maintaining and improving our clients' experience of the business. In this capacity she is involved with all our clients, but in addition she leads the teams advising eight defined benefit pension schemes, ranging in size from £70m to £2bn. These include clients for which we act as an investment consultant, and clients that have appointed us as fiduciary manager. Over her career to date she has in-depth experience of working with many more clients, including larger DB schemes, DC schemes, sovereign wealth funds and charities. Barbara has significant experience of providing advice across the full range of investment considerations. Barbara's investment expertise is reflected also in her role as a leading member of the Investment Strategy Committee, which interprets the house view on investment strategy for application to consultancy clients. She has a particular depth of understanding of liability hedging, having spent the early part of her career modelling and trading LDI strategies for DB pension schemes. In 2012 she was identified by Financial News as one of the "Rising Stars" in European Capital Markets. Barbara is a qualified actuary. She graduated in 2004 with first class degree in Mathematics from Royal Holloway, University of London, and obtained a Post Graduate Diploma in Actuarial Science from Cass Business School.

Conference Notes

Purpose: Against the background of a rapidly changing pensions industry, this conference aims to examine the key investment challenges currently facing pension funds, looking behind the headlines to assess the solutions currently being proposed and the challenges expected to face funds in 2018 and beyond

Date: Thursday 9 November 2017 **Venue:** Le Meridien, 21 Piccadilly, London, W1J 0BH. Tel: 020 7734 8000.

Cost: There is no cost to you to attend this event and your conference documentation, drinks, lunch, tea and coffee breaks will all be provided free of charge. If you would like to nominate a colleague to attend please ask them to contact us so we can ensure they are eligible for a free place. SPS events are exclusively aimed at genuine pension fund executives, trustees and their advisers, who may qualify for free entry. SPS Conferences reserves the right of admission (free or paid) and our decision is final.

Cancellation: prior to 26 October 2017 subject to a fee of £60.00. No refunds can be made if cancellation is after this date but delegates may be substituted at any time. Cancellation by SPS will result in a full refund of delegate fees paid but no other expenses incurred.

Amendments: SPS reserves the right to amend or cancel the conference at any time but will always attempt to give prior notice. Cancellation by SPS will result in a full refund of delegate fees paid but no other expenses incurred.

PMI Accreditation: Attendance at the conference will be given 6.5 hours of CPD with the PMI.

Data Protection: Personal data is gathered in accordance with the Data Protection Act 1998. Your details may be passed to other companies including the conference sponsors who may wish to provide you with offers or other information related to your business activities. If you do not want to receive such information please tick the box in the booking form below.

Specialist Pension Services: SPS Conferences is a small, specialist company focusing entirely on providing essential, high quality and timely investment information to Large Pension Funds and their Advisors via a series of one day conferences in London and in key locations throughout Europe. SPS Conferences is the sister organisation of the EPFIF (European Pension Fund Investment Forum) and has been running investment conferences for the Pension Fund community since 1993. A wide range of investment and related topics are covered, including Alternative Investing, Bonds, Equities, Property, Absolute Return, Private Equity, Risk Management and DC Issues. Furthermore, because we know that you prefer to be educated rather than sold to, we strongly encourage our speakers to focus on giving educational speeches. An Advisory Committee of Pension Funds has been set up to help us keep our conferences relevant to your needs year on year, as we understand that there is a preference to be amongst peers at conferences rather than be outnumbered by Marketing Executives from Service Providers and so we have a very strict admittance policy biased heavily towards Large Pension Funds. We aim to have more pension funds in the room than service providers. SPS Conferences understand that delegates appreciate generous question and answer sessions during the conference and we also provide a number of opportunities to talk to your peers and the speakers. This includes tea/coffee break(s), a full three course sit down lunch and a drinks reception at the end of the day. When you put all this together, you get conferences where you can learn essential, timely information to assist you with all areas of pension fund investment management, in a friendly, relaxed, atmosphere amongst your peers. please visit our website: www.spsconferences.com for an update of this conference and details of the other specialist pension and investment conferences we organise.

Queries: please contact: Ms Sue Golton at Specialist Pension Services Limited. Telephone +44 (0)1438 712345 Telefax +44 (0)1438 718883 Email: sue@spsconferences.com

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Booking Form

Please read the Conference Notes, then complete the details below.

Please reserve place(s) at The **SPS Annual Round Up & Current Investment Issues Conference** taking place on 9 November 2017.

Free guest places are offered to genuine pension and institutional investor attendees. Please contact us to confirm you qualify. A limited number of provider places at a cost of £1590 + VAT may be available. Please enquire to Sue Golton sue@spsconferences.com.

Surname:.....

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