

## Asset Management Breakfast Briefing

### BUILDING THE NEXT-GENERATION ASSET MANAGER

Thursday 15<sup>th</sup> October, 8.00-10.30, Bloomberg, 3 Queen Victoria Street, London EC4N 4TQ

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| 0800-0820 | <b>BREAKFAST &amp; NETWORKING</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| 0820-0830 | <b>INTRODUCTION.</b> Alan Coutts, Managing Director Wealth & Asset Management EMEA, Alvarez & Marsal                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 0830-1015 | <p><b>AI, DATA AND THE FUTURE OF BUSINESS</b></p> <p>AI is accelerating change across asset management, but realising its potential will depend on the foundations firms put in place around data, technology and their wider operating models. At the same time, the move towards more modular, composable solutions is challenging traditional assumptions about how capabilities should be built, connected and delivered.</p> <p>Drawing on Bloomberg's perspective across the buy-side, enterprise data and product development, this session will explore how firms can position themselves for the next phase of technological change, including:</p> <ul style="list-style-type: none"><li>• AI business trends – where AI is beginning to have the greatest impact and how priorities are evolving across the industry.</li><li>• From AI ambition to AI readiness – the data quality, accessibility, governance and infrastructure required to move beyond experimentation.</li><li>• The Bloomberg product roadmap – how changing client needs, technology and AI are shaping the evolution of tools and solutions.</li><li>• Composable business models – what the shift towards more modular and interconnected capabilities means for the future operating model.</li><li>• Connecting data, technology and workflows – breaking down silos and creating an infrastructure capable of supporting new use cases.</li><li>• Balancing flexibility with control – ensuring greater modularity does not introduce additional complexity, fragmentation or operational risk.</li><li>• Building for what comes next – creating an organisation capable of adapting as technology, products and client expectations continue to evolve.</li></ul> <p><i>With Bloomberg's Charles Cliff - Buy-Side Enterprise Sales Team Lead, Ksenia Bure - EMEA Head of Enterprise Data Sales and Robert Gee - Head of Market Specialists EMEA</i></p> |
| 1015-1030 | <b>CLOSING REMARKS FOLLOWED BY NETWORKING</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

#### WHAT IS THE CONTEXT OF THESE BRIEFINGS?

We are delighted to continue this series for the C-Suite of mid to large Asset Managers in the UK. The idea is to provide a platform for the key decision makers and their peers to strategise together about the biggest challenges facing their business and the industry and ultimately try to find ways to collaborate and drive change forward.

# BreakfastBriefing

## PARTICIPANT LIST

- **Aegon Asset Management** – *Global Chief Operating Officer*
- **Asset Management One International Ltd** - *Chief Operating Officer*
- **BP Investment Management** – *Managing Director, Head of Europe & Africa*
- **CCLA Investment Management** – *Chief Operating Officer*
- **CG Asset Management Ltd** – *Chief Operations Officer*
- **Crown Agents Investment Management (part of Momentum)** – *Head of Operations*
- **Evelyn Partners** – *Chief Financial Planning Director*
- **Federated Hermes** - *Head of Operations*
- **Fundsmith** – *Head of Operations*
- **Julius Baer International** – *Head of Middle Office*
- **M&G Investments** – *Director of Asset Manager Operations*
- **Navera Investment Management** – *Chief Operating Officer & Chief Technology Officer*
- **Rathbones Group PLC** - *Head of Business Enablement*
- **Ruffer LLP** – *Chief Technology Officer*
- **Sarasin & Partners LLP** – *Partner, Chief Operating Officer*
- **Seilern Investment Management Ltd** - *COO, Compliance Officer & MLRO*
- **T.Rowe Price** – *EMEA Chief Operating Officer*
- **Tatton Investment Management** – *Chief Operating Officer*
- **Valu-Trac Investment Management** – *Chief Executive Officer*
- **Wellington Management International Ltd** - *Vice President, Global Fund Data Manager*

## EXPERTS & ORGANISERS

- **Alvarez & Marsal** – *Alan Coutts, Managing Director Wealth & Asset Management EMEA*
- **Alvarez & Marsal** - *Dewi Rees, Senior Director*
- **Bloomberg** – *Charles Cliff, Buy-Side Enterprise Sales Team Lead*
- **Bloomberg** – *Ksenia Bure, EMEA Head of Enterprise Data Sales*
- **Bloomberg** – *Robert Gee, Head of Market Specialists EMEA*
- **Owen James Group** – *James Goad, Managing Director*
- **Owen James Group** – *John Hall, Senior Delegate Manager*
- **Owen James Group** – *Rebecca Leitch, Conference & Content Manager*