

# 16 MAY 2019

# fundseurope

## European FundTech Lab

FURNITURE MAKERS' HALL, LONDON



**Amundi** Services

**Calastone** 

**metrosoft**



**ORACLE**  
Financial Services

# EUROPEAN FUNDTech LAB

## FUNDS IN THE DIGITAL ERA

*Funds Europe*, in association with Amundi Services, Calastone, Metrossoft, Milestone Group and Oracle, has launched the European FundTech Lab – an initiative to forward technological development at a more granular level within the funds industry.

The forum is designed to allow interaction between a range of market participants, both large and small, including asset managers, distributors and asset servicers.

The introduction of digital technology to cut down on automated processes or harness the power of data has been described as “glacial”, but over the past year various events involving blockchain and machine learning within the funds industry suggest this is changing. Our initiative has the single aim of promoting discussion between all parties about how to advance from here.

Technology is seen both as an enabler and a threat to the funds industry in equal measure. We are creating a forum to discuss the implications of technology that will aid in making sure further progress is made.

## AGENDA TIMINGS

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**14.30 - Registration:** Coffee and Tea

**15.00 - Opening and welcome:** [Alan Chalmers](#), Publisher,  
*Funds Europe*

**15.05 - Blockchain and crypto asset management** – The rise of blockchain and crypto/digital assets could see traditional asset managers out of business in less than a decade unless they adapt. So says Nick Ayton who will describe how wealth and asset management is already changing and what incumbents need to do to survive.

[Nik Pratt](#), Technology and Operations Editor, *Funds Europe*

[Nick Ayton](#), Founder, Chainstarter and Blockchain evangelist

**15.35 - The battle for data ownership** – Data is an increasingly precious commodity not just for fund managers but also for their service providers – custodians, administrators and data vendors. This panel discussion looks at how successful fund managers have been in managing their in-house data, how AI and ML can be applied to data (front-office data especially) and whether there is a battle brewing for ownership of this data.

**Chaired by:** [Bob Currie](#), Research Editor, *Funds Europe*

**Panel:**

[Tony Peacham](#), Head of Data Management and Reporting, Amundi

[Phil Hannay](#), Managing Consultant, Catalyst

[Mateusz Derejski](#) Country Head Poland, Metrossoft

[Phil Davies](#), Executive Director and CTO, Milestone Group

## AGENDA TIMINGS

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### 16.05 - Coffee break

**16.25 - The Big Interview:** How are fund managers incorporating behavioural science into their investment decisions and product design? How is behavioural science being employed in AI and ML tools used in the industry?

**Nick Fitzpatrick**, Group Editor, *Funds Europe*

**Greg Davies**, Head of Behavioural Science, Oxford Risk

**16.55 - Platforms 2.0** – Do the fund platforms and supermarkets that revolutionised funds distribution in the 90s need a technology reboot? What does a next generation fund platform look like? Is there a threat of disruption from tech-enabled peer2peer start ups?

**Chaired by: Nik Pratt**, Technology and Operations Editor, *Funds Europe*

**Panel:**

**Edward Glyn**, Managing Director, Head of Global Markets, Calastone

**Katrina Sartorius**, Managing Director Institutional, Cofunds

**Matthew Newnham**, Managing Director, UK & Ireland, MFEX

**17.25 - Summary and close:** **Alan Chalmers**, Publisher, *Funds Europe*

**17.30 - Networking:** Drinks and canapés

## SPEAKERS

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**NICK AYTON**  
**FOUNDER, CHAINSTARTER AND BLOCKCHAIN**  
**EVANGELIST**

A leading advocate for blockchain technology, cryptocurrency and tokenomics, Nick has spent over 30 years working in the technology sector. In recent years he has been focused on the use of new technology advancements to redefine operating models and customer propositions. In addition to founding crypto advisory firm Chainstarter, Nick is also CEO of The 21 Million Project, the world's first ICO-funded blockchain TV series.



**TONY PEACHAM**  
**HEAD OF DATA MANAGEMENT**  
**AND REPORTING, AMUNDI**

Tony has worked in investment since 1998. He's responsible for the Data Management & Client Reporting Group in Dublin. In previous Amundi roles he was responsible for Enterprise Data Platforms, Global IT Operations & Infrastructure & Database Management & IT Security. He has a Stock Broker Management diploma from Dublin Business School & an MSc in Computer Forensics & Digital Investigations from University College Dublin.



**PHIL HANNAY**  
**MANAGING CONSULTANT, CATALYST**

Phil is a specialist in system and data architectures and operating models for asset managers and hedge funds. Before joining Catalyst (which merged with Sionic Advisors in April 2019) Phil was IT lead at Lehman Brothers where he was responsible for building and simplifying the administration's systems and data platform, having also worked at a number of software vendors and service providers.

## SPEAKERS

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**MATEUSZ DEREJSKI**  
**COUNTRY HEAD POLAND, METROSOFT**

Mateusz has over 18 years of experience in building and delivering software solutions for global players in the asset management industry. He focuses on overseeing engineering and market adoption of Metrosoft's solutions that transform distribution, transfer agency services and compliance. His main interest is

around industry's data, their standardization and flows.



**PHIL DAVIES**  
**EXECUTIVE DIRECTOR AND CTO, MILESTONE GROUP**

Phil has over 20 years' experience in senior technology management roles and is the architect and innovative force behind the development of Milestone Groups' business process solutions which have been recognised globally as market leading

solutions in funds processing and handling of complex financial transactions. Prior to co-founding Milestone Group in 1998, Phil was Head of Technology at Rothschild Australia Asset Management.



**GREG DAVIES**  
**HEAD OF BEHAVIOURAL SCIENCE, OXFORD RISK**

Greg started the banking world's first behavioural finance team as Head of Behavioural-Quant Finance at Barclays, which he built and led for a decade from 2006. In 2016, he founded behavioural consulting firm Centapse, before joining forces with Oxford Risk in

late 2017 to combine consulting with the development of decision support tools to help people (and organisations) make better financial decisions.

## SPEAKERS

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### **EDWARD GLYN** **MANAGING DIRECTOR – HEAD OF GLOBAL MARKETS**

Edward joined Calastone in 2014 and is responsible for managing and developing key client relationships across our global markets. Before joining Calastone, Edward spent nine years at SWIFT, most recently heading up the 100m transaction funds business across

EMEA and leading the regional sales team managing SWIFT's investment management, custody and asset servicing offerings.



### **KATRINA SARTORIUS** **MANAGING DIRECTOR, INSTITUTIONAL, COFUNDS**

Katrina is responsible for developing and implementing the future strategy for the Institutional book of business driving forward its growth, increasing coverage and diversifying its business working directly with its clients and strategic partners. She is

also responsible for the management of the profit and loss for the business. Prior to her role with Aegon she worked at Euroclear SA/NV for 17 years.



### **MATTHEW NEWNHAM** **MANAGING DIRECTOR, MFEX UK & IRELAND**

Having spent the last 5 years in MFEX's head office in Stockholm, Matthew recently moved to London to take up the role of Managing Director of MFEX UK & Ireland. Previously he has worked at Citi, based in Luxembourg, Hong Kong and Australia, in product and programme management roles in fund services,

transfer agency, middle office and electronic markets in the Global, EMEA and Asia Pacific management teams.

## MODERATORS

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### **NICHOLAS PRATT** **TECHNOLOGY EDITOR, FUNDS EUROPE**

Nicholas has been writing about financial technology for 20 years. He began with Banking Technology magazine in 1999 becoming editor in 2001 and has also edited numerous publications including Risk Professional, Enterprise Risk, Commercial Risk Asia, IT Law Today and Media World. Nicholas started writing for Funds Europe

in 2004 and is Technology and Operations editor.



### **BOB CURRIE** **RESEARCH EDITOR, FUNDS EUROPE**

Bob has over 20 years' journalistic experience with a multi-disciplinary background spanning global political economy, IT, financial regulation and business communications. Prior to joining Funds Europe, he was editorial director and co-founder of Financial Services Research. He was also editor for

GSCS Benchmarks, Metal Bulletin plc and a lecturer in International Political Economy at both Huddersfield University and Leeds University.



### **NICK FITZPATRICK** **GROUP EDITOR, FUNDS EUROPE**

Nick became editor of Funds Europe in May 2007, having previously been deputy editor on another financial title. He has spent seven years in financial journalism – most of that at FTBusiness – and three years in general news. He also worked as a researcher on the book 'Great Parliamentary Scandals' by Matthew Parris. He has a degree in Spanish and spent one year

studying at the University of Havana

## ABOUT

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### AMUNDI SERVICES

Amundi Services is a strategic business line in Amundi responsible for outsourcing solutions to asset managers and investors. These solutions cover Dealing activities, Portfolio Management System (technology & services), Fund Hosting (ManCo & investment management services) and transition management.

### CALASTONE

Calastone is the largest global funds transaction network, connecting many of the world's leading financial organisations. Their mission is to make funds accessible to everyone by reducing the frictional cost of trading. Calastone uses smart technology solutions and industry collaboration to lower operational risk and enhance client profitability through digitisation and automation.

### METROSOFT

Metrosoft is a fintech company that develops multi-tier, service-oriented asset management software using the latest programming technologies.

Metrosoft partners with global investment industry clients to create solutions that deliver measurable improvements in efficiency, revenue protection, increased client satisfaction, transparency and risk reduction.

## ABOUT

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### MILESTONE GROUP

Milestone Group provides advanced software solutions to the funds management industry including its flagship product, the pControl Fund processing application platform. Formed in 1998, the company now operates globally with clients in Europe, North America, Asia, Australia and South Africa.

### ORACLE

Oracle has embedded innovative technologies in every aspect of our cloud, enabling companies to reimagine their businesses, processes, and experiences. Oracle is the #1 provider of business software, with a broad portfolio of solutions for companies of all sizes. Today, 430,000 customers in 175 countries use Oracle technologies to seize business opportunities and solve real, tangible challenges.

### FUNDS EUROPE

*Funds Europe* is the leading title for senior institutional investors, fund managers, asset servicing professionals and fund distributors. Published ten times per year, each issue offers exclusive news, analysis, features and interviews providing a complete view of the cross border funds industry; including coverage of investment strategy, geo-political issues that affect investments, asset allocation, regulation, custody and transfer agency.



# CONNECTING YOU

Funds Europe is the leading journal for the cross-border funds business. Each month you will find detailed coverage of the funds industry, spanning Ucits, alternative investment funds and ETFs. We are unique in covering the full life-cycle of funds, from investment strategy and economics, through to regulation, asset servicing and post-trade services.

Funds Europe is read by CEOs, CTOs and COOs working within institutional, wholesale and retail investment. It is also read by professionals working in areas such as family office, private banking and fund services companies across 43 countries in Europe. It is published in print 10 times a year with a daily e-newsletter seen by more than 13,000 recipients. All content is available to view free of charge on our website and accessible via social media.

Whether you are concerned with investing, asset allocation, distribution, regulation, technology or outsourcing, Funds Europe connects the funds industry with thought leaders.

Providing Thought Leadership for Thought Leaders

[www.funds-europe.com](http://www.funds-europe.com)

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