



## INNOVATING TOGETHER: WHO IS THE PERFECT PARTNER?

Tuesday, October 5<sup>th</sup> 2021  
Palais Brongniart - Paris

organisé par **L'AGEFI**

membre de **INVEST  
WEEK • PARIS**

### PROGRAMME

**08:30 am - 09:05 am: WELCOME**

**09:05 am - 09:10 am: INTRODUCTION ROOM 1**

François ROBIN, COO - L'AGEFI

**09:10 am - 10:00 am: OPENING PRESENTATION**

- **How can services and organisations be improved through partnerships? What role has innovative technology played? ROOM 1**

Moderator: Alexandre GARABEDIAN, Managing editor - L'AGEFI

Speakers:

**Jean-Jacques BARBERIS**, Head of institutional and corporate clients division, ESG supervisor - AMUNDI

**Corentin FAVENNEC**, Head of key account partnerships - GENERALI PATRIMOINE

**Florence FONTAN**, Head of compagny engagement, and general secretary - BNP PARIBAS SECURITIES SERVICES

**Thomas VAN CAUWELAERT**, Region head France, Belgium, Luxembourg - CLEARWATER ANALYTICS

**Indira VIGNON**, Chief Data & Innovation Officer - ARKÉA IS

**10:10 am - 10:40 am: PARTNER WORKSHOPS**

- **SEISMIC: Maximise the business impact of your content! ROOM 1**

*Testimonial from Natixis Investment Management*

Seismic gives your marketing and sales teams the ability to:

- Become more productive and efficient ... faster
- Engage with customers in a more relevant and personalised way
- Analyse the effectiveness of content management strategies

Speakers:

**Laurent DANINO**, Head of technology & data science - NATIXIS INVESTMENT MANAGEMENT

**Romain FRAN CZIA**, Regional vice-president southern europe - SEISMIC

- **SIMCORP: How an open ecosystem facilitates access to innovation for buy-side firms? ROOM 2**

- Identify business activities where innovation can help create a competitive advantage
- Optimize collaboration with fintechs providers
- Keep control on your data thanks to the IBOR (Investment book of record)
- Move to a « as-a-service » architecture to help your clients grow

Speakers:

**Géraud DE BONNAFOS**, Head of customer experience - SIMCORP SOUTHWESTERN EUROPE

**Eric HELEINE**, Head of buy-side trading desk & overlay management - GROUPAMA ASSET MANAGEMENT

**Guillaume SABOURET**, Founder and CEO - STARQUBE

■ **BNP PARIBAS SECURITIES SERVICES: Rolling out your ESG strategy: how to make the most of the fintech ecosystem. ROOM 3**

- What are the advantages of a multi-partner approach?
- What challenges need be anticipated to implement and run your ESG strategy?
- The power of Manaos: an open ESG platform created and supported by BNP Paribas Securities Services

Speakers:

**Remi TOUCHEBOEUF**, Global head of Investment Analytics - BNP PARIBAS SECURITIES SERVICES

**Amandine LEROY**, Product Manager – MANAOS

■ **FINASTRA: Technology as a catalyst of transformation and innovation ROOM 4**

Covid pandemic, regulation and competition exacerbate the need to change the way technology is consumed.

- A true cross-asset investment management platform accelerate growth and maximize efficiency
- Cloud and services offered around it enable focus on differentiating activities
- Openness & APIs facilitate collaboration and access to innovation

Speakers:

**Alexis BEUVE**, Transformation program manager: SAFe, agility, platform, Cloud - FINASTRA

**Olivier GNOS**, CEO - ADJUTO SOFTWARE

**Remi PREVOT**, Services Director, Fusion Invest Global services, FINASTRA

**Didier VAN HEIRSTRATEN**, Head of IT IMS – CANDRIAM

**10:40 am - 11:50 pm: PARTNER WORKSHOP**

■ **EY: Back in the game: ESG across the value chain ROOM 4**

ESG issues transform all the industrial models of the players: from the aggregation of different new ESG data to the management of investments and risks to the link with the end investor via new commitments, we will go through the main operational transformations, based on new technological solutions, which the players initiate

Speakers:

**Manisha DEECHLAND**, Director, Wealth & Asset Management - EY

**Thierry GROUÈS**, Partner France, Wealth & Asset Management Consulting Lead - EY

**Philippe LIMANTOUR**, Chief Innovation Officer - EY & Associés

**Renaud PIASTRELLI**, Senior Manager – EY - CONSULTING ASSET MANAGEMENT

**10:40 am - 11:10 am: NETWORKING BREAK EXHIBITION AREA**

**11:10 am - 11:50 am: ROUND TABLES**

■ **What is the ideal partner for an ESG-augmented strategy? Is it possible to devise an ESG policy and enhance non-financial analysis using AI? ROOM 1**

Moderator: Yann DE SAINT-MELEUC, Partner - A2 CONSULTING

Speakers:

**Julien CIROUX**, Managing director - ACCENTURE

**Guillaume HERAUD**, Head of marketing - SOCIETE GENERALE SECURITIES SERVICES

**Yolande POULOU**, Head of RI Solutions - AXA IM

**Pierre VALENTIN**, Chairman of the executive board – ECOFI

■ **How should crypto-assets and crypto-currencies be managed in portfolios? ROOM 2**

Moderator: Valérie RIOCHET, Specialized journalist - L'AGEFI

Speakers:

**Thierry BREVET**, General manager - THE WEST OF ENGLAND SHIP OWNERS MUTUAL INSURANCE ASSOCIATION

**Jean-Charles DUDEK**, Co-founder - NAPOLEON GROUP

**Pietro GRASSANO**, Business solutions director Europe - ALGORAND

**Olivier TAILLE**, Vice chair of the AFG's technological innovations committee - AFG

■ **RegTech: how can it help management companies and investors adapt to regulatory change? How can RegTech help them address operational issues and manage data? ROOM 3**

Moderator: Pauline ARMANDET, Specialized journalist - L'AGEFI

Speakers:

**Frédéric BERNARD**, Product specialist - risk - AXIOMSL

**Nicolas PESSARD**, Product manager transaction regulatory reporting - MUREX

**Julien RAIMBAULT**, Head of operations & technology - OSTRUM AM

**Alexis WIAZMITINOFF**, Product leader - global transaction reporting - COMPLIANCE SOLUTIONS STRATEGIES

#### 11:50 am - 12:00 pm: KEYNOTE SPEAKER

- **DELOITTE : What is the future for extra-financial data integration model? ROOM 1**

Speakers:

**Nicolas DE JENLIS**, Partner, Head of Sustainable Finance Services - DELOITTE

**Yoan CHAZAL**, Partner, investment management services leader France & Monaco, DELOITTE

- **WOORTON : Digital assets: no more excuses ROOM 2**

Speaker:

**Charlie MERAUD**, CEO - WOORTON

- **SCORECHAIN: Crypto investment and regulation ROOM 3**

Speaker:

**Pierre GERARD**, CEO – SCORECHAIN

#### 12:10 pm - 12:40 pm: PARTNER WORKSHOPS

- **AMUNDI TECHNOLOGY: Digital and aggregation: the new frontiers for financial advice and services ROOM 1**

- The rise of new digital technologies and open banking is redefining the solutions for financial advice
- How digital and aggregation are transforming the relationship between bankers and their clients
- How Amundi Technology helps financial advisors integrate these new technologies into their advisory approach

Speakers:

**Cécile FALCON**, Co head Alto wealth & distribution - AMUNDI TECHNOLOGY

**Zakaria LAGUEL**, Co-head of Alto weath & distribution, CEO - WESAVE

- **MIPISE: Digitizing subscription operations in all types of investment funds ROOM 2**

- Management companies, a market in transition: increasing impact of regulatory constraints, lower commissions, regulation of retrocessions, and new expectations from subscribers and distributors. The sector must adapt to expectations that have changed significantly ("anywhere, anyhow, anytime" with more environment, more efficiency, more use of digital technology).
- The dematerialization of financial processes: a key step in the transformation of the sector. Mipise provides support to management companies in the digital transition of their activities. This workshop will introduce you to the Mipise solution by reviewing the main stages of the investment cycle.
- The Mipise solution: a complete software package for the fund subscription process that accelerates, simplifies and makes the investment process more reliable (subscription workflow, management of asset managers/distributors, kyc-aml-cft management, investor extranet, payment module).

Speakers:

**Jean-Michel ERRERA**, CEO and co-founder - MIPISE

**Maxime ERRERA**, Sales manager - MIPISE

**Michel IVANOVSKY**, Chairman and co-founder - MIPISE

- **SOCIETE GENERALE SECURITIES SERVICES: At the heart of performance, ESG and regulation : data control ROOM 3**

Data management is a major challenge at the centre of all issues of the investment industry.

- How to manage all the data efficiently?
- Towards data platform?
- In house solutions or outsourcing?

Our panelists will share their vision and experience

Speakers:

**Stéphanie GAUDOUX**, Head of coverage France - SOCIETE GENERALE SECURITIES SERVICES

**Hubert LE LOURD**, Chief operating officer - GROUPAMA AM

**Guillaume ROUIL**, Chief data officer - AXA IM

**Pierre-Henri SALLE**, Partner - ALPHAFMC

■ **BOTTOMLINE: GTMatch: The reconciliation solution that solve pendings!** *ROOM 4*

- Global reconciliation solution, multi financial instrument multi-entity
- Modular solution, advanced pick-and-mix functionalities
- Resolve module allowing to solve pendings (validated gaps, fees not recorded...sent to the PMS or any business application)
- SaaS mode and full web client

Speakers:

**Philippe MODAI**, Director of business development - BOTTOMLINE

**Vitus ROTZER**, Sales director Europe - BOTTOMLINE

**Armel-David WOLFF**, Product owner - BOTTOMLINE

**12:40 pm - 13:55 pm: LUNCH EXHIBITION AREA**

**13:15 pm – 13:55 pm: AM TECH DAY AWARDS TV SET**

**13:55 pm - 14:25 pm: PARTNER WORKSHOPS**

■ **99 ADVISORY: How to differentiate and give credibility to your Impact Investing strategy?** *ROOM 2*

- Presentation of the Impact Investing market that is currently being structured and presents numerous opportunities
- Focus on 3 challenges asset managers are often facing when defining and running their Impact Investing activity
  - Lack of dealflow
  - Definition and access to reliable, relevant and aggregable data
  - Credibility of the approach with clients (methodology, data and measurements, objectives)
- Feedback from an investment fund on the above points, notably through a robust methodology or the use of an external firm

Speakers:

**Prune DES ROCHES**, Partner infrastructure - ANDERA PARTNERS

**Laurent HASSAN**, Senior manager sustainable advisory - 99 ADVISORY

**Nicolas MONNET**, Senior manager asset management - 99 ADVISORY

**13:55 pm - 14:55 pm : PARTNER WORKSHOP**

■ **CAPGEMINI: Evolution of the Wealth Management, opening for the new era of effective collaboration to industrialize, innovate and maximize Client Experience** *ROOM 4*

- The World Wealth Report 2021. Evolution of the Wealth Management, opening for the new era of effective collaboration to maximize Client Experience.
- Open discussion between Azqore & Indosuez Wealth Management : How IT&BO mutualization can accelerate agility and innovation for Wealth managers ?

Speakers:

**Maxime GAUDIN**, VP wealth & asset management - CAPGEMINI INVENT

**Elias GHANEM**, VP global head market intelligence - CAPGEMINI

**Frédéric KEMP**, Chief market officer - AZQORE

**Pierre MASCLET**, Deputy managing director, business development - INDOSUEZ WEALTH MANAGEMENT

**13:55 pm - 14:35 pm: OPENING PRESENTATION**

■ **How can tech firms help with adaptation to the new regulatory environment around sustainability (Disclosure Regulation)?** What are the challenges for financial institutions? *ROOM 1*

Moderator: Adrien PAREDES-VANHEULE, Specialized journalist - L'AGEFI

Speakers:

**Joseph EL GHARIB**, Head of business development - AMUNDI TECHNOLOGY

**Marie-Pierre PEILLON**, Head of Research and ESG strategy - GROUPAMA AM

**Iain RICHARDS**, Head of global responsible investment policy - COLUMBIA THREADNEEDLE INVESTMENTS

**Edouard SAINTOIN**, Associé en charge de l'activité Wealth & Asset Management pour la France - EY

**14:35 pm - 14:55 pm: KEYNOTE SPEAKER ROOM 1**

**Douglas CIFU**, CEO - VIRTU FINANCIAL

**15:05 pm - 15:35 pm: PARTNER WORKSHOPS**

■ **CACEIS: Leading by Client Satisfaction : why & how we integrate the pulse of client satisfaction in our day-to-day activities ROOM 1**

- A new Client Satisfaction approach to support group transformation
- The critical importance of the feedback loop to allow continuous improvement of all services
- How adoption of new technologies allows to implement the concept of « 0 distance »

Speakers:

**Mathieu ALIA**, Group Head of digital transformation & product marketing - CACEIS

**Jean-Christophe DE CONINCK**, Head of sales & development France – CACEIS

■ **REFINITIV: Sustainable or Impact investing – what it means within a multi-faceted group such as the London Stock Exchange Group. ROOM 2**

- The benefits of a multi-faceted group from driving structural change to providing products and services to the financial community
- Update on regulations such as SFDR, EU Taxonomy, Green Deal for Europe...
- Accessibility and accuracy of data
- What about Green Washing?  
Join the experts from Refinitiv, Beyond Ratings and FTSE Russell for an open and pragmatic panel discussion from origination, listing, regulation and data provision.

Speakers:

**Dr Barnabas ACS**, Global director, sales strategy & execution, sustainable investing - REFINITIV, AN LSEG BUSINESS

**Delphine DIRAT**, Senior manager, government relations and regulatory strategy - REFINITIV, AN LSEG BUSINESS

**Hilary NORRIS**, Product manager - BEYOND RATINGS AN LSEG BUSINESS

**Lisa REGAN**, Head of sales, platform - REFINITIV, AN LSEG BUSINESS

■ **NEW ACCESS: Banking 4.0 : the new digital standards of 2021 ROOM 3**

- RM 4.0: features of 2021 digital cockpit
- The new normal of digital and its technical requirements
- Software vendor: from challenges to solutions.

Speakers:

**Ludovic BALACE**, Global head of pre-sales - NEW ACCESS

**Julien COURONNE**, Marketing project manager - NEW ACCESS

**Vincent JEUNET**, CEO - NEW ACCESS

■ **ONFIDO: The fight against identity fraud and customer experience: how to find the right balance? ROOM 4**

- State of play of fraud in the financial sector
- Identity fraud is becoming more professional: insights, trends and challenges
- Identity verification solutions available to the market and their security levels

Speaker:

**Stéphane CHATELAIN**, Senior account enterprise - ONFIDO

**15:45 pm - 16:35 pm : PARTNER WORKSHOP**

■ **CAPGEMINI: How Asset Managers can innovate in partnership models? ROOM 4**

- Models Make / Buy / Share
- Program Scale-up and Maturity assessment OpenX - Capgemini
- Innovative partnerships
- Client use cases - Clearwater Analytics

Speakers:

**Maxime GAUDIN**, VP wealth & asset management - CAPGEMINI INVENT

**Elias GHANEM**, VP global head market intelligence - CAPGEMINI

**Thomas VAN CAUWELAERT**, Region head France, Belgium, Luxembourg - CLEARWATER ANALYTICS

### 15:45 pm - 16:25 pm: ROUND TABLES

- **How can tech providers enable small and medium-sized management companies to grow faster and at a lower cost?** Is data management becoming more accessible? **ROOM 1**

Moderator: Réjane REIBAUD, Editor-in-chief asset management - L'AGEFI

Speakers:

**Marina CORGHENCI**, Global head of fund companies relationship - MFEX GROUP

**Vincent LAPADU-HARGUES**, Head of asset management - support to R&D- FINANCE INNOVATION

**Laurent MAJCHRZAK**, Deputy global head of 3d (digital / data / dissemination) and global head of product - CACEIS

**Olivier MALLET**, Head of artificial intelligence & analytics France - COGNIZANT

- **Wealth management: what transformations are key to remaining competitive? What are the top fintechs in Europe?** **ROOM 2**

Moderator: Benoit MENOUE, Specialized journalist - L'AGEFI

Speakers:

**Stéphane GOMIS**, Deputy CEO - AZQORE

**Zakaria LAGUEL**, Co-responsible d'Alto wealth & distribution, directeur - WESAVE

**Olfa MAALEJ** - NEUFLZE OBC

**Bruno PIFFETEAU**, Country head of france - ALL FUNDS

- **How can private equity and real estate work with tech firms to improve their ESG performance?** **ROOM 3**

Moderator: Aroun BENHADDU, Specialized journalist - L'AGEFI

Speakers:

**Ella ETIENNE-DENOY**, CEO & partner - GREENSOLUCE

**Benoît MOULIN**, Co-founder - DOMOS FS

**Fanny PICARD** - ALTER EQUITY

**Zineb SEBBAR**, Product manager director for eFront Insight - BLACKROCK

### 16:25 pm - 16:35 pm : KEYNOTE SPEAKERS

- **BLACKROCK: technology as a business catalyst** **ROOM 1**

Speaker: **Patricia FOUQUERAY**, Managing Director - BLACKROCK SOLUTIONS

- **FUND CHANNEL: From outsourcing towards marketplace: How to optimise fund business with distribution platforms?** **ROOM 2**

Speaker: **Pierre-Adrien DOMON**, Chief executive officer - FUND CHANNEL

- **BLOOMBERG: How technology and data science is set to unleash quantitative investing** **ROOM 3**

Speaker: **Javier MITRA VALDES**, Head of BQuant product – BLOOMBERG

### 16:35 pm - 18:00 pm: AM TECH DAY AFTERNOON TREAT **EXHIBITION AREA**

With a special appearance from:

- **Maxence Barbot, Pastry Chef - SHANGRI-LA HOTEL**

Top chef Maxence Barbot and his team have created a signature dessert for the conference, partly inspired by the chef's Breton roots. This will also be an opportunity to hear how he finds his inspiration and what innovation means for him.

## ■ Le Philtre

Combining hedonism and ecology: Frédéric and Charles Beigbeder have created Le Philtre Organic, a 100% natural vodka that contains no added sugar. A tasting of Le Philtre is on offer as part of our afternoon treat.

### TV SET PROGRAMME

Moderators:

Ludivine GARNAUD, Events editor - L'AGEFI

Adrien LAUGIER-WERTH, Journalist

#### 10:00 am - 10:05 am: START-UP PITCH

Paul BEZAULT, CEO - ASSET SAGACITY

#### 10:05 am - 10:10 am: START-UP PITCH

Yann KASTELNIK, Deputy CEO - ONEWEALTHPLACE / AIRFUND.IO

#### 10:25 am - 10:30 am: START-UP PITCH

Issam MHERA, CEO - PODYAM

#### 10:30 am - 10:35 am: START-UP PITCH

Thomas CHEVALIER, European executive director - TEMENOS MULTIFONDS

#### 10:35 am - 10:40 am: START-UP PITCH

Jean-Philippe RAYSSAC, Sustainable finance director - AXIONABLE

#### 10:50 am - 11:00 am: INTERVIEW

Thomas VAN CAUWELAERT, Region head France, Belgium, Luxembourg - CLEARWATER ANALYTICS

#### 11:00 am - 11:10 am: INTERVIEW

Myriam FERRAN, CFA, Consulting director– asset management - COGNIZANT

Paul BUREAU, Head of Business Development and Client Service – MANAOS

#### 11:10 am - 11:20 am: INTERVIEW

Hervé ALEXANDRE, Dean of the chair finech - UNIVERSITÉ DE PARIS DAUPHINE-PSL

#### 11:20 am - 11:30 am: INTERVIEW

Bruno PIFFETEAU, Country head of France - ALLFUNDS

#### 11:30 am - 11:40 am: INTERVIEW

Louis BERTUCCI, Scientific Coordinator of the FaIR program (Finance and Insurance Reloaded) - INSTITUT LOUIS BACHELIER

#### 11:40 am - 11:50 am: INTERVIEW

Faustine FLEURET, President & CEO- ADAN

#### 12:30 pm - 12:40 pm: INTERVIEW

Guillaume LESAGE, Deputy chief executive officer & chief operating officer - AMUNDI TECHNOLOGY

#### 13:15 pm - 13:55 pm: AM TECH DAY AWARDS



#### 14:30 pm - 14:40 pm: INTERVIEW

Pietro GRASSANO, Business solutions director europe - ALGORAND

#### 14:40 pm - 14:50 pm: INTERVIEW

Guillaume-Olivier DORÉ, Media - FINANCE MAG POUR LA PLACE FINTECH

#### 14:50 pm - 15:00 pm: INTERVIEW

Hermin HOLOGAN, Partner, EMEIA FSO wealth & asset management leader - EY

#### 15:00 pm - 15:10 pm: INTERVIEW

Alain CLOT, Founding Chairman - FRANCE FINTECH

#### 15:10 pm - 15:20 pm: INTERVIEW

Olivier BOSSARD, Executive Director of the MSc Finance - HEC PARIS BUSINESS SCHOOL

#### 15:20 pm - 15:40 pm: INTERVIEW

Fleur PELERIN, Founder & Managing Partner - KORELYA CAPITAL

**15:45 pm - 15:55 pm: INTERVIEW**

Maxence BARBOT, Pastry chef – SHANGRILA

**16:00 pm - 16:10 pm: INTERVIEW**

Antoine COLSON, CEO – IPEM

**16:10 pm - 16:15 pm: INTERVIEW**

Emma SIX, Associate Fintech – KLEIN BLUE PARTNERS

**17:00 pm - 17:30 pm: VIRTUAL FINANCE REGATTA AWARDS**

With a special appearance from the navigator Michel DESJOYEUX