

Thomson Reuters Malta Stock Exchange Investment Managers' Forum

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WED 14TH FEBRUARY 2018

9.00AM - 13.05PM

VENUE: MALTA STOCK EXCHANGE



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The latest agenda for the event is:

- 9.00AM** Registration
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- 9.30AM** Welcome address, **Mr Joseph Portelli**, Chairman,
Malta Stock Exchange
-
- 9.40AM** Welcome address, **Prof Edward Scicluna**,
Minister for Finance
-
- 9.50AM** Keynote speech, **Mr Detlef Glow**, Thomson Reuters
-
- 10.10AM** Panel discussion -
**Current challenges and opportunities
in the financial markets**

Albert Conca, AQA Capital Ltd
Wayne Spiteri, HSBC Global Asset Management, Malta
Detlef Glow, Thomson Reuters
Alexander Gunz, Heptagon Capital

Moderated by **Joseph Portelli**,
Chairman, Malta Stock Exchange
-
- 11.00AM** Coffee break
-
- 11.30AM** Keynote speech, **Mr Gerry Perez**, Interactive Brokers (UK) Ltd
-
- 11.50AM** Panel discussion -
The changing role of the investment management industry

Mark Agius, BOV Asset Management
Manuel Leanza, Thomson Reuters
Gerry Perez, Interactive Brokers (UK) Ltd
Grégoire Tézé, AUM Asset Management Ltd

Moderated by **Kenneth Farrugia**,
Chairman, FinanceMalta
-
- 12.40PM** Keynote speech -
Regulating Virtual Currencies: The MFSA Approach

Dr Christopher P. Buttigieg
Securities and Markets Supervision Unit, MFSA
-
- 13.00PM** Concluding Address

Persons interested in attending this event are asked to email: events@borzamalta.com.mt - attendance will be confirmed on a 'first come, first served' basis since space is limited.

Hon. Prof. Edward Scicluna MP

Hon. Professor Edward Scicluna is a Member of Parliament and Malta's Minister for Finance since March 2013. During 2013, Prof. Scicluna assumed the chairmanship of the EIB, and vice-chairmanship of the EBRD. Prior to March 2013 he served as a member of the European Parliament (MEP), in the capacity of Vice-Chair of the Economic and Monetary Affairs Committee (ECON), and a member of the European Statistical Advisory Committee (ESAC). Previous appointments include that of Professor and Head of the Department of Economics at the University of Malta, Chairman of the Malta Financial Services Authority, Chairman of the Malta Council of Economic and Social Development, Board Director of the Central Bank of Malta, and Electoral Commissioner. Prof. Scicluna also carried out consultancy work for international institutions. Prof. Scicluna graduated from the University of Oxford with a Diploma with distinction in politics and economics, from the University of Malta with a First Class Honours BA degree in Economics, and the University of Toronto with a Masters and Doctorate in Economics.

Detlef Glow

Detlef Glow is Head of Lipper EMEA Research at Thomson Reuters. He joined the firm in 2005 from FERI Wealth Management, where he was Director of Portfolio Management, managing segregated accounts for high net worth individuals (HNWI). Prior to FERI, he spent nine years with tecis Holding AG, most recently as Head of Fund Research for tecis Asset Management AG. In this role he was responsible for the quantitative and qualitative fund research for the tecis fund of funds, the HNWI accounts and the recommendation list of funds for the financial adviser arm of tecis. Detlef has an MBA focusing on Financial Services from the University of Wales/Cardiff, as well as a BA in Business Administration.

Alberto Conca

Alberto Conca has over 20 years of experience in portfolio management, having worked in the United States, Ireland, Italy and Switzerland. After graduating in Economics from the University of Pavia, Alberto moved to Connecticut (USA), where he worked on the development of non-linear models for the prediction of volatility. He later returned to Italy and worked for RAS, becoming the Head of Equity at Aletti Gestielle. Alberto then worked as a fund manager for Kairos Alternative Investments, and at Pioneer Alternative Investments, where he co-managed the Global Long Short Fund from Ireland. In 2008, he arranged and managed funds at Sequoia and later at Lemanik. Alberto is the Chief Investment Officer at AQA Capital Ltd.

Wayne Spiteri

Wayne Spiteri was appointed as Managing Director of HSBC Global Asset Management in January 2017. Wayne joined HSBC Malta in 2012, from HSBC UK, where he spent 4 years out of his 9 years in London working in Global Markets. He has held significant roles in HSBC Bank Malta PLC, including Head of Global Banking and Markets between October 2015 and May 2016 and more recently led the financial institutional business. Prior to joining HSBC Mr Spiteri held a number of senior positions at Societe Generale Corporate and Investment Bank and Deloitte (Malta and Luxembourg). Wayne is a Certified Public Accountant holds a number of qualifications including a B.Accty (Hons) from the University of Malta and Fellow of the Malta Institute of Accountants.

Joseph Portelli

Joseph Portelli has over 32 years' experience employed in various capacities within the financial industry in the U.S and in Malta. He has vast experience as a portfolio manager, currency and commodity trader and has been employed with Bank of America, Nomura Securities, Goldman Sachs, Millburn Ridgefield, Global Capital, and Liongate Capital Management. His most recent position was chief investment officer and managing director of FMG Funds, an emerging markets specialist. He is currently Chairman of the Malta Stock Exchange and sits on its Audit Committee. Between April 2013 and April 2015 he sat on its board and chaired its Risk Management Committee. He is also Chairman of the Financial Literacy Board focused on improving financial literacy in Malta consisting of Malta Stock Exchange and Ministry of Education members. He is principal of Risk Compliance Ltd a company which services the fund industry in various capacities focusing primarily on risk management, compliance and directorship services.

Alexander Gunz

Alexander Gunz has a 20-year background in finance and has been at Heptagon Capital since 2011, where his role includes managing the Future Trends Equity Fund and involvement in the firm's multi-manager programme for discretionary clients. Prior to joining Heptagon, Alex was a top-ranked equity research analyst at firms including Credit Suisse and JP Morgan. Alex has a degree in Philosophy, Politics and Economics from Oxford University.

Gerry Perez

Gerry Perez has been in the financial markets for over 25 years and has worked across Europe and the United States. He has a broad level of experience and skills across different parts of the industry e.g., he is a former authorised and registered institutional derivatives trader, compliance officer, money laundering officer, and CF10a. Gerry has appeared on a variety of broadcast outlets (Bloomberg, CNBCs, NDTV, etc.), discussing subject matters relating to the financial services sector. Today, Gerry is the Managing Director of Interactive Brokers (U.K.) Limited (IBUK) and is based in London. IBUK is part of the Interactive Brokers (IBKR) Group of companies. IBKR conducts its broker/dealer business on over 120 market destinations worldwide. In its broker dealer agency business, IBKR provides direct access ("on line") trade execution and clearing services to institutional (funds, family offices, banks, brokers, advisers) and professional traders for a wide variety of electronically traded products including stocks, options, futures, forex, bonds, CFDs and funds worldwide.

Mark Agius

Mark Agius is the Executive Head of BOV Asset Management, a fully owned subsidiary of Bank of Valletta plc. Mark joined the Bank in 1987 and during his career has held executive and senior management positions at BOV Wealth Management. Mark is the Education Director of the Institute of Financial Services in Malta. Mark holds a BSc Honours in Financial Services from the University of Manchester and is an Associate of the Institute of Financial Services in UK.

Manuel Leanza

Manuel Leanza leads Thomson Reuters Advisory and Investment Management Specialists for the Middle East. His team serves financial professionals by helping them power their investment process with the best data and technology, multi-asset portfolio analytics and alternate data sets in a seamless workflow. This enables them to deploy new quantitative strategies, derive value from big data and AI, and find new sources of alpha. Manuel has worked for Thomson Reuters since 2008 where he has held several roles, initially in the Italian market, and then in the MENA Region.

Grégoire Tézé

Grégoire Tézé is a graduate in Business Management from Clark University in the USA. He combines over 30 years of experience in the financial sector. After a career start at BNP Paribas, and at Arthur Andersen as a Financial Auditor, he got specialised over the last 15 years in the Fund Management Industry, mainly at RAM Capital and EIM, where he directed marketing and development activities for 10 years in Europe and Asia. He joined AUM in April 2016.

Kenneth Farrugia

Kenneth Farrugia is the current Chairman of FinanceMalta, Malta's national promotional body for financial services, and also serves as Chairman of the Malta Funds Industry Association. He is also the Chairman of Malita Investments plc which is listed on the Malta Stock Exchange. Kenneth joined Bank of Valletta plc (BOV), Malta's largest banking group, in 1985 and has since occupied various positions within the Bank. Kenneth currently holds the post of Chief Business Development Officer at Bank of Valletta plc and sits on the Group's Management Board. Kenneth is amongst others responsible for the improvement of the Bank's market position, as well as the achievement of financial growth and long-term strategic business goals.

Christopher P. Buttigieg

Dr Christopher P. Buttigieg is the Director of the Securities and Markets Supervision Unit of the Malta Financial Services Authority, which Unit is responsible for work in the field of policy, regulation and supervision of securities and markets. He is a member of the Authority's Supervisory Council and the MFSA's alternate member on the ESMA Board of Supervisors. Dr Buttigieg has a commerce degree (B.Com 1998), an accountancy degree (B.Accty. Hons. 2000) and a financial services law degree (M.A. Fin. Ser. 2003) from the University of Malta, as well as a European Union law degree (M.A. EU Law and Soc 2005) and a doctoral degree in law (Ph.D 2014) from the University of Sussex (UK). His Doctoral thesis deals with the governance of EU securities regulation and supervision. Dr Buttigieg is a lecturer in the Banking and Finance Department of the University of Malta and has published various papers on financial regulation and supervision in academic and professional journals, including the Columbia Journal of European Law, the ERA Forum, the Journal of Business Law, the Journal of Financial Regulation and Compliance and the Law and Financial Markets Review.



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