



INSURANCE ASSET MANAGEMENT SUMMIT

NOVEMBER 15TH, 2018

Etc. Venues, St Paul's, UK

CONNECTING HEADS OF
INSURANCE INVESTMENT,
FINANCE, OPERATIONS AND RISK

 #IAMSUMMIT18

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THE INSURANCE ASSET ALLOCATION, INVESTMENT STRATEGY, INVESTMENT OPERATIONS AND RISK EVENT DESIGNED BY INSURERS

The way European insurers allocate capital and invest, manage operations and risk is at an inflection point. Prompted by the pain of low interest rates, growing appetite to diversify portfolios, and the need to counter stubbornly high investment operation and risk costs, new innovation has emerged, providing answers that drive positive outcomes.

The third annual **Insurance Asset Management Summit** brings together the community of European investment, finance, operations and risk professionals with leading regulators. Structured as an interactive, two-streamed format, the latest ideas for positively impacting portfolio returns and driving operational cost and risk management efficiencies will be explored, providing for valuable learning opportunities. Based on a market research exercise designed by insurers, for insurers, the Summit is the must attend event of 2018 for senior decision makers involved in the allocation of insurance capital.

Keynote Speakers



Dr. Olaf Sleijpen,
Management
Board Member,
**European Insurance
Occupational Pensions
Authority**, Director
of the Supervision
Policy Division, **De
Nederlandsche Bank**



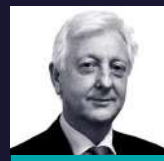
Jeffrey Franks,
Director of the **IMF
Europe Office** and Senior
Resident Representative
to the **European
Union, International
Monetary Fund**



Alan Sheppard,
Head of Insurance Policy,
Bank of England



Michael Koller,
Group Risk Director,
Prudential



Dr. Bruce T. Porteous,
Investment Director
- Global Insurance
Solutions, **Aberdeen
Standard Investments**



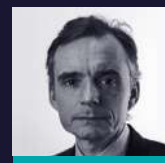
Felix Schlumpf,
Head of Strategic Asset
Allocation - Investment
Management, **Zurich
Insurance Company**



Paul Barrett,
Chief Operating
Officer, Enterprise Risk
Management, EMEA, **AIG**



Vishal Shah,
Head of Investment
Operations, **Brit
Insurance**



Christopher Granville,
Managing Director,
EMEA and Global Political
Research, **TS Lombard**



Fabrice Montagné,
Chief UK and Senior
European Economist,
Barclays Speaker



Ian Coulman,
Chief Investment Officer,
Pool Re



Laura Worboyes,
Head of Investment
Operations, **MS Amlin**,
Director, Chief Finance
& Risk Officer, **MS
Amlin Investment
Management**

ONLY REPRESENTATIVES OF INSURERS AND REGULATORY BODIES CAN APPLY FOR FREE PASSES. GET IN TOUCH WITH US USING YOUR CORPORATE EMAIL ADDRESS TO RESERVE YOUR SEAT, AT **REGISTRATIONS@CLEARPATHANALYSIS.COM** OR **CALL +44 (0) 207 688 8511**. FOR MORE INFORMATION VISIT **WWW.CLEARPATHANALYSIS.COM**

"Impressed by the refreshing format of the conference, using the breakout groups to hear a range of perspectives including investment managers, insurers and regulators"

ASHLEY WILKS, HEAD OF CAPITAL, CO-OP INSURANCE

AN EVENT FOR THE WHOLE DECISION-MAKING UNIT

Asset allocation and investment decisions are rarely taken in isolation but rather in collaboration with the needs of investment, finance, cash management, operations and risk considered. By introducing both an *Asset Allocation & Capital Management* with *Investment Operations & Risk* stream, the **Insurance Asset Management Summit** caters to the whole investment decision making unit through one interactive day of content and networking.

ONLY 100
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EVENT - RESERVE YOUR TEAM
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WHAT'S ON OFFER IN 2018

- Strict 2:1 attendee ratio of insurers to non-insurers, providing a relaxed networking and learning environment so you can return to the office with fresh ideas and take your asset management approach forward with positive momentum
- Breakfast Briefing on, ***The rise of Socialism, populist political movements and the global economic opportunities that have emerged as a result***, which will help you better understand emerging risks and opportunities to be aware of
- Insight from both European and UK regulatory spokespersons, enabling insight into short and long-term priorities that could influence your investment, operation and risk plans
- **Talking Table** workshops: closed door, interactive discussions in each Stream focussed on the most popular issues in agenda research (see page 5 for topics)
- Crucial input from one of the world's most influential investment groups and economic influencers, the **International Monetary Fund**, enabling you to learn the country and industry specific opportunities and risks set to benefit from injections in private capital

Industry Professionals in attendance will include:

- | | |
|---|--|
| • Chief Investment Officers | • Chief Risk Officers |
| • Heads of Investment Strategy | • Heads of Asset-Liability Management |
| • Heads of Asset Allocation | • Heads of Technology, Data and Information |
| • Chief Operation Officers | • Finance Directors |
| • Heads of Investment Operations | • Treasurers and Cash Managers |

AGENDA

TIME	BREAKFAST BRIEFING	
8:00 - 8:40	THE RISE OF SOCIALISM, POPULIST POLITICAL MOVEMENTS AND THE GLOBAL ECONOMIC OPPORTUNITIES THAT HAVE EMERGED AS A RESULT <ul style="list-style-type: none"> • Christopher Granville, Managing Director, EMEA and Global Political Research, TS Lombard 	
TIME	MAIN CONFERENCE	
8:15 - 9:10	BREAKFAST AND NETWORKING	
9:10 - 9:20	CHAIRMAN'S OPENING ADDRESS	
9:20 - 10:00	KEYNOTE SPEECH: POLICY PLANNING FOR THE END OF QUANTITATIVE EASING - IMPLICATIONS FOR EUROPEAN INSURERS FROM A RETURN TO GROWTH <ul style="list-style-type: none"> • Dr. Olaf Sleijpen, Management Board Member, European Insurance Occupational Pensions Authority, Director of the Supervision Policy Division, De Nederlandsche Bank 	
10:00 - 10:45	PANEL DEBATE: POLITICAL AND SOCIO-ECONOMIC MODELLING – SETTING AN INVESTMENT PLAN ON A SCENARIO BASIS AND DEVELOPING A LIQUIDITY PLAN <p><i>Issues to be covered include:</i></p> <ul style="list-style-type: none"> • How do you manage liquidity effectively – the balance between cash holdings, risk assessments and lost opportunities • Estimating where we are in the credit cycle • Contagious behaviour: investors are heading into similar assets and potentially taking on too much risk - navigating the herd effect <p>Moderator:</p> <ul style="list-style-type: none"> • Mike Gallagher, Head of Markets Research, Continuum Economics <p>Panellists:</p> <ul style="list-style-type: none"> • Alan Sheppard, Head of Insurance Policy, Bank of England • Fabrice Montagné, Chief UK and Senior European Economist, Barclays • Michael Koller, Group Risk Director, Prudential Plc • Ian Coulman, Chief Investment Officer, Pool Re 	
10:45 - 11:10	KEYNOTE SPEECH: EXAMINING THE GROWING ROLE OF PRIVATE MARKETS AND THE MOVE TOWARDS MULTI-ASSET APPROACHES – INVESTMENT STRATEGY, RISK AND OPERATIONAL CONSIDERATIONS <ul style="list-style-type: none"> • Dr. Bruce T. Porteous, Investment Director – Global Insurance Solutions, Aberdeen Standard Investments, and Craig Turnbull, Investment Director – Global Insurance Solutions, Aberdeen Standard Investments 	
11:10 - 11:30	MORNING REFRESHMENTS	
	STREAM 1 - Asset Allocation and Capital Management	STREAM 2 - Investment Operations & Risk
11:30 - 11:45	Stream Chairman's opening remarks	Stream Chairman's opening remarks
11:45 - 12:25	PANEL DEBATE: MAKING THE MOST OF SHORT-TERM CASH HOLDINGS AND ACHIEVING DIVERSIFICATION AT THE LOWEST CAPITAL COST? <p>Moderator:</p> <ul style="list-style-type: none"> • Independent journalist <p>Panellists:</p> <ul style="list-style-type: none"> • Felix Schlumpf, Head of Strategic Asset Allocation - Investment Management, Zurich Insurance Company • Daniel Blamont, Head of Investment Strategy, Phoenix Group • Mike Leonard, Head of Investment Solutions, LV • Marco Diolosa, Head of Rates and Derivatives, Pension Insurance Corporation • Jean Sorasio, Global Head of the Insurance Business Line, Amundi Asset Management 	PANEL DEBATE: INCREASING REGULATION AND THE IMPACT ON COST MANAGEMENT: EXPLORING WAYS TO DO MORE WITHOUT INCREASING RESOURCES <p>Moderator:</p> <ul style="list-style-type: none"> • Independent journalist <p>Panellists:</p> <ul style="list-style-type: none"> • Laura Worboyes, Head of Investment Operations, MS Amlin, Director, Chief Finance & Risk Officer, MS Amlin Investment Management • Vishal Shah, Head of Investment Operations, Brit Insurance
12:25 - 13:25	TALKING TABLE: WORKSHOP ROUND 1 AND 2*	TALKING TABLE: WORKSHOP ROUND 1 AND 2*

11:10 - 11:30	LUNCH	
14:10 - 14:35	KEYNOTE SPEECH: NAVIGATING THE CHALLENGES OF IMPLEMENTING NEW ASSET CLASSES <ul style="list-style-type: none"> • Representative, PIMCO 	KEYNOTE SPEECH: REVOLUTIONISING PORTFOLIO RISK MODELLING AND EXAMINING CUTTING EDGE APPROACHES TO ACHIEVING OPTIMAL INVESTMENT SOLVENCY CAPITAL RATIO SCORES <ul style="list-style-type: none"> • Reserved for Event Sponsor
14:35 - 15:00	REGULATOR UPDATE: PROMOTING A SUSTAINABLE FUTURE - HOW WILL THE PRUDENTIAL REGULATORY AUTHORITY ENCOURAGE POSITIVE INVESTMENT BEHAVIOUR <ul style="list-style-type: none"> • Alan Sheppard, Head of Insurance Policy, Bank of England 	INSURER Q&A: UTILISING ALTERNATIVE DATA AND AUTOMATION TO STREAMLINE OPERATIONS AND MANAGE RISK <ul style="list-style-type: none"> • Interviewer: <i>Reserved for Event Sponsor or Journalist</i> • Interviewee: Paul Barrett, Chief Operating Officer, ERM EMEA, AIG
15:00 - 15:30	TALKING TABLE: WORKSHOP ROUND 3*	TALKING TABLE: WORKSHOP ROUND 3*
11:10 - 11:30	AFTERNOON REFRESHMENTS	
15:00 - 15:30	TALKING TABLE: WORKSHOP ROUND 4*	TALKING TABLE: WORKSHOP ROUND 4*
16:10 - 16:50	SPECIAL GUEST ADDRESS: THE WORLD IN 2019 AND THE ROLE OF PRIVATE CAPITAL IN TACKLING EMERGING GLOBAL ECONOMIC ISSUES <ul style="list-style-type: none"> • Jeffrey Franks, Director of the IMF Europe Office and Senior Resident Representative to the European Union, International Monetary Fund 	
16:50 - 18:30	DRINKS RECEPTION	

'TALKING TABLES' – INTERACTIVE WORKSHOPS FOR ENGAGED ATTENDEES

Talking Tables is our highly interactive workshop format, which brings together audience members within an informal roundtable debate setting to discuss the most pertinent industry themes put forward by insurance professionals in pre-event research.

ASSET ALLOCATION & CAPITAL MANAGEMENT STREAM TOPICS:

1. **Investment strategies in a changing risk and regulatory environment - hosted by Aon**
2. **Entering the market and developing your private asset portfolio mix - hosted by NN Investment Partners**
3. **The rise in alternative risk premia and multi-factor approaches to investing - hosted by Aberdeen Standard Investments**
4. **Preparing for inflation and interest rises - hedging strategies and cost management - hosted by Aberdeen Standard Investments**

INVESTMENT OPERATIONS & RISK STREAM TOPICS:

For inquiries regarding hosting a *Talking Table* workshop, get in touch with Noel Hillmann at noelhillmann@clearpathanalysis.com

1. **Mitigating the risks of increasingly sophisticated cyber and security threats**
2. **GDPR: How to ensure third party suppliers are being properly managed**
3. **The lessons of Solvency II matching adjustment**
4. **Automating the operations division - developing hybrid man and machine operations and risk departments**

LOCAL ACCOMMODATION

Hotels that are local to St. Paul's and receive excellent reviews are:

- **Club Quarters, St. Paul's** - <https://clubquartershotels.com/locations/club-quarters-hotel-st-pauls-london>
- **Malmaison, Charterhouse Square** - <https://www.malmaison.com/locations/london/>
- **The Grange Hotel** - www.grangehotels.com/hotels-london/grange-st-pauls/



REGISTRATION

To register your place for FREE, contact us today. Remember seats are strictly limited to representatives of insurers and regulatory bodies.

🌐 www.clearpathanalysis.com/events/insurance-asset-management-summit-2018

☎ +44 (0) 207 688 8511

✉ registrations@clearpathanalysis.com

in www.linkedin.com/groups/8505058

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"Good relevance of topics, opportunity for discussions with peers"

**IAN ROGERS, SENIOR MANAGER - INVESTMENT CAPITAL ANALYSIS,
INSURANCE AND WEALTH, LLOYDS BANKING GROUP**

ABOUT THE SUMMIT PARTNERS

As a free to attend event for insurers and regulatory representatives, we'd like to thank our valuable Summit Sponsors for their continued support of free-to-access learning and events for insurance decision makers.



ABOUT BECOMING A SPONSOR

Summit Sponsors will have the opportunity to present at the **Insurance Asset Management Summit**, educating 70+ UK and European insurance professionals. Alternatively, opportunities to participate as a **Talking Tables** workshop host, exhibit, or offer content on the day are available for event partners.

If you think your organisation can benefit from sponsorship or you would simply like to know more about how you can engage with our attending insurers, call Noel Hillmann, Chief Executive Officer, on **+44 (0) 207 688 8511** or email **noelhillmann@clearpathanalysis.com**

'Really enjoyed the 'Talking Tables' format, very interesting hearing the reasons different insurers'

TAYFUN ATAHER, INVESTMENT ACCOUNTING MANAGER, BRIT INSURANCE



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Utilising our extensive history of serving institutional finance professionals, our surveys and bespoke events provide a rich source of information and venues to network with like-minded peers.

By tackling industry issues from the perspective of users, Clear Path Analysis reports, surveys and events are relied upon by senior executives for first-hand insights into sector specific changes that are shaping their organisation.

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