



Bond Fund Symposium

Our 9th annual event for bond mutual fund managers, professionals and servicers.

March 19-20, 2026 • Hyatt Regency Boston • Boston, Mass.

Crane's Bond Fund Symposium 2026

Dear Bond Fund & Fixed Income Professional:

Please join us for **Bond Fund Symposium 2026**, which will take place **March 19-20, 2026** at **The Hyatt Regency Boston in Boston, Mass.!** Thanks to those who supported our last show in Newport Beach, and we hope to see you again in March.

Crane's Bond Fund Symposium focuses on ultra-short bond funds, bond funds and fixed-income ETFs, and attracts **bond fund managers**, fixed-income dealers, issuers, strategists and servicers. **Registration for BFS** is **\$1,000**, and includes access to the day-and-a-half event and materials, plus meals and refreshments. **Sponsorship packages** are **\$3K, \$4K and \$5K** and speaking slots are still available. Sincerely, **Pete Crane, Crane Data**

Bond Fund Symposium Conference Agenda

Thursday, March 19

9:10-9:20am **Welcome to Bond Fund Symposium 2026**

Peter Crane, President & Publisher, **Crane Data**

9:20-10:10am **Ultra-Short Bond Fund Update: Spring Break**

Teresa Ho, Managing Director, **J.P. Morgan Securities**

Jerome Schneider, Managing Director, **PIMCO**

10:10-11:00am **State of the Bond Fund Marketplace**

Lei Li, Senior Economist, **Investment Company Institute**

Peter Crane, President & Publisher, **Crane Data**

11:00-11:30am **Coffee Break**

sponsored by **Capitolis**

11:30-12:20pm **Bond Market Strategists: Rates & Returns**

Will Hoffman, Senior Rate Strategist, **Bloomberg Intelligence**

Additional Speaker TBD

12:20-1:20pm **Lunch**

sponsored by **Fitch Ratings**

1:20-2:10pm **Senior Portfolio Manager Perspectives**

Moderator: **Peter Crane**, President, **Crane Data**

Dave Martucci, PM & Head of Mgd Res, **J.P. Morgan A.M.**

Richard Mejzak, Managing Director, **BlackRock**

Dave Rothweiler, Portfolio Manager, **UBS Asset Mgmt**

2:10-3:00pm **Separately Managed Accounts & LGIPs**

Moderator: **John Donohue**, MD, **RBC Global Asset Mgmt.**

Kelsey Bosshard, Portfolio Manager, **RBC Global A.M.**

Peter Gargiulo, Senior Director, **Fitch Ratings**

Patricia Kao, Head of SVB A.M., **Silicon Valley Bank**

3:00-3:30pm **Refreshments**

sponsored by **Fidelity Investments**

3:30-4:15pm **Core Bond, Municipal & Stable Value Issues**

Kevin Calabro, VP, Sr. Prod. Specialist, **Franklin Templeton**

Morten Olsen, Co-Head of Tax Alpha, **Northern Trust A.M.**

Michael Salvay, Managing Director, **Payden & Rygel**

4:15-5:00pm **ETF Index & Near-Cash ETF Trends**

Marcel Benjamin, VP, **State Street SPDR Fixed-Inc. Group**

Rahul Ghai, Senior Analyst, **S&P Global Ratings**

James Palmieri, Managing Director, **State Street Inv Mgmt**

5:00-7:00pm **Cocktails**

sponsored by **Northern Trust Asset Mgmt.**

Friday, March 20

8:00-9:00am **Breakfast**

sponsored by **Bloomberg Intelligence**

9:00-10:00am **Money Funds & Conservative Ultra-Shorts**

Peter Crane, President & Publisher, **Crane Data**

10:00-11:00am **Regulatory Update: BF Issues '26**

Jamie Gershkow, Partner, **Stradley Ronon**

Louis Rosenbaum, Associate, **Dechert LLP**

11:00-11:30am **Break**

sponsored by **UBS Asset Management**

11:30-12:15pm **Sustainable & European Bond Fund Update**

Henry Shilling, Founder, **Sustainable Res & Analysis**

John Hunt, Partner, **Sullivan & Worcester LLP**

12:15-12:30pm **Bond Fund Data & Information**

Peter Crane, President & Publisher, **Crane Data**

Register at: <https://www.cranesbfsymposium.com/>.

Bond Fund Symposium Sponsors & Exhibitors

Northern Trust **UBS Asset Mgmt.** **Fitch Ratings** **J.P. Morgan A.M.** **Bloomberg Intelligence**
Capitolis **Fidelity Investments** **Mayer & Brown** **Dreyfus** **J.P. Morgan Securities** **Crane Data**
Dechert **Northcross Capital** **GLMX** **PIMCO** **Morgan Stanley I.M.** **Payden & Rygel**

Thank You to Our Sponsors and Speakers!

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Bronze Sponsor - \$3,000

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- Includes sponsorship of available break.
- Includes 2 conference registrations.
- Includes list of attendees.

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- Recognition in conference brochure, website, program and during the conference.
- Includes sponsorship of available break.
- Includes 4 conference registrations.
- Includes list of attendees with contact information.

Gold Sponsor - \$5,000

- Highest level of recognition in conference brochure, website and during the conference.
- Includes sponsorship of lunch, breakfast or cocktails.
- Includes 5+ conference registrations.
- Includes list of attendees with contact information.



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Crane's Money Fund Symposium 2026

June 24-26, 2026

Jersey City, NJ



Crane Data

measures money and provides competitive intelligence on money market & bond mutual

funds. Crane Data was founded by money fund expert **Peter G. Crane** and computer & statistics guru **Shaun Cutts**.

Our mission is faster, cheaper, and cleaner fund information.

Crane Data

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About The Hyatt Regency Boston

The **Hyatt Regency Boston** is set in the **heart of downtown Boston's financial district** and offers guests easy access to historical attractions, shopping, entertainment, and dining. **Call the Hyatt at 617-912-1234** in order to secure the conference rate of \$275 (plus tax) or [click here](#). Reservations must be made before our block is sold out or Feb. 21. For more information, visit the website www.bondfundsymposium.com or contact Peter Crane (508-439-4419 or pete@cranedata.com) or Natielli Mendes (nmendes@cranedata.com or 508-870-2918) with any questions or requests. **We hope to see you in Boston in March!**

