



Bond Fund Symposium

Our 7th annual event for bond mutual fund managers, professionals and servicers.

March 25-26, 2024 • Loews Philadelphia Hotel • Philadelphia, Pa.

Crane's Bond Fund Symposium 2024

Dear Bond Fund & Fixed Income Professional:

Mark your calendars for **Bond Fund Symposium 2024**, which will take place **March 25-26, 2024** at **The Loews Philadelphia Hotel in Philadelphia, Pa.!** Thanks to those who supported our last show in Boston....

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 2-day event and materials, plus meals and refreshments. **Sponsorship packages** are **\$3K, \$4K and \$5K**. We hope to see you in Philly!
 Sincerely, **Pete Crane, Crane Data**

Bond Fund Symposium Conference Agenda

Monday, March 25

9:10-9:20am **Welcome to Bond Fund Symposium 2024**

Peter Crane, President & Publisher, Crane Data

9:20-10:10am **State of the Bond Fund Marketplace**

Shelly Antoniewicz, Deputy Chief Economist, ICI

Peter Crane, President & Publisher, Crane Data

10:10-11:00am **Ultra-Shorts: Staying Positive, Conservative**

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

Richard Mejzak, Managing Director, BlackRock

Joseph D'Angelo, Managing Director, PGIM

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

sponsored by **Capitolis**

11:30-12:20pm **ETF & Near-Cash ETF Trends**

Brian McMullen, ETF Strategist, Invesco

James Palmieri, Managing Director, State Street Global Adv.

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

sponsored by **J.P. Morgan A.M.**

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.

Dave Rothweiler, Portfolio Manager, UBS Asset Mgmt

Jerome Schneider, Managing Director, PIMCO

2:10-3:00pm **ETF Index Fund & Longer-Term BF Issues**

Bill Ahmuty, MD Head of SPDR F-I, State Street Global Adv.

Matthew Brill, I-G Portfolio Manager, Invesco

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

sponsored by **UBS Asset Management**

3:30-4:15pm **Money Funds & Conservative Ultra-Shorts**

Peter Crane, President & Publisher, Crane Data

Dan LaRocco, Head of US Liquidity, Northern Trust A.M.

4:15-5:00pm **Bond Market Strategists: Rates & Risks**

Jay Barry, Head US Rates Strategy, J.P. Morgan Securities

Michael Cloherty, Head US Rates Strategist, UBS

Ira Jersey, Chief Rates Strategist, Bloomberg Intelligence

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

sponsored by **Northern Trust Asset Mgmt.**

Tuesday, March 26

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

sponsored by **GLMX**

9:00-10:00am **Major Issues in Fixed-Income Investing**

George Bory, Chief Inv. Strategist, F-I, Allspring Global

Nicholas Tripodes, Senior VP & Sr PM, Federated Hermes

10:00-11:00am **Regulatory Update: Bond Fund Issues '24**

Aaron Withrow, Partner, Dechert LLP

Rebecca Rodrigues, Associate, Stradley Ronon

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

sponsored by **Morgan Stanley Inv. Mgmt.**

11:30-12:20pm **Ultra-Shorts, LGIPs & Bond Fund Ratings**

Peter Gargiulo, Director, Fitch Ratings

Michael Masih, Director, S&P Global Ratings

12:20-1:00pm **European, ESG Bond Funds & Fund Data**

David Callahan, Head of Money Mks, Lombard Odier I.M.

Henry Shilling, Founder, Sustainable Research & Analysis

Peter Crane, President & Publisher, Crane Data

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

Bond Fund Symposium Sponsors & Exhibitors

Northern Trust GLMX Capitolis Morgan Stanley I.M. UBS Asset Mgmt. J.P. Morgan A.M.
Bloomberg Intelligence Fidelity Investments Fitch Ratings J.P. Morgan Securities Dreyfus
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Thank You to Our Sponsors and Speakers!



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Crane's Bond Fund Symposium Sponsorship Opportunities

\$5,000

- Highest level of recognition in conference brochure, website and during the conference.
- Includes sponsorship of break.
- Includes 6+ conference registrations.
- Includes list of attendees with detailed contact information, plus a briefing on conference feedback.

Bronze Sponsor - \$3,000

- Recognition in conference brochure, website and program.
- Includes sponsorship of 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 -



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Crane's Money Fund Symposium 2024

June 12-14, 2024

Pittsburgh, Pa.



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 Loews Philadelphia Hotel

The **Loews Philadelphia Hotel** is located in the heart of downtown Philadelphia in the nation's first skyscraper and "combines living history with warm sophistication." Call the Loews at **215-627-1200** in order to secure the conference rate of **\$229** (plus tax) or [click here](#). Reservations must be made before our block is sold out or **Feb. 27**. For more information, visit the website www.cranesbfsymposium.com or contact **Peter Crane** (508-439-4419; pete@cranedata.com) or **Natielli Mendes** (508-870-2918; nmendes@cranedata.com) with any questions or requests. We hope to see you in Philly in March!

