



Bond Fund Symposium

Our 8th annual event for bond mutual fund managers, professionals and servicers.

March 27-28, 2025 • Hyatt Regency • Newport Beach, Calif.

Crane's Bond Fund Symposium 2025

Dear Bond Fund & Fixed Income Professional:

Please join us for **Bond Fund Symposium 2025**, which will take place **March 27-28, 2025** at **The Hyatt Regency in Newport Beach, Calif.!** Thanks to those who supported our last show in Philadelphia, and we hope to see you again Southern California!

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**. We hope to see you in late March! Sincerely, **Pete Crane, Crane Data**

Bond Fund Symposium Conference Agenda

Thursday, March 27

9:10-9:20am **Welcome to Bond Fund Symposium 2025**

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

9:20-10:10am **Ultra-Short Bond Funds: Surf's Finally Up**

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

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

Jerome Schneider, Managing Director, **PIMCO**

10:10-11:00am **Bond Market Strategists: Rates & Returns**

Michael Cloherty, Head US Rates Strategist, **UBS**

Ira Jersey, Chief Rates Strategist, **Bloomberg Intelligence**

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

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

11:30-12:20pm **State of the Bond Fund Marketplace**

Shelly Antoniewicz, Chief Economist, **ICI**

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

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

sponsored by **Fitch Ratings**

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

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

Richard Mejzak, Managing Director, **BlackRock**

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

Nicholas Tripodes, Senior VP & Sr PM, **Federated Hermes**

2:10-3:00pm **Long-Term & Core Bond Fund Issues**

James Palmieri, Managing Director, **State Street Global**

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

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

sponsored by **Dreyfus**

3:30-4:15pm **LGIPs, ETFs & Bond Fund Ratings**

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

Marissa Zuccaro, Associate Director, **S&P Global Ratings**

4:15-5:00pm **Sustainable and D&I Bond Fund Offerings**

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

Samuel Ramirez, Jr., President & CEO, **Ramirez A.M.**

La-Yona Rauls, Managing Director, **Mischler Financial**

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

sponsored by **Northern Trust Asset Mgmt.**

Friday, March 28

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

sponsored by **Bloomberg Intelligence**

9:00-10:00am **ETF Index & Near-Cash ETF Trends**

Marcel Benjamin, VP, **SPDR F-I Group**, **State Street Global**

Matthew Brill, I-G Portfolio Manager, **Invesco**

10:00-11:00am **Regulatory Update: BF Issues '25**

Louis Rosenbaum, Associate, **Dechert LLP**

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

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

sponsored by **UBS Asset Management**

11:30-12:30pm **Money Funds & Conservative Ultra-Shorts**

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

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

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

12:30-12:45pm **Bond Fund Data & Information**

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

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

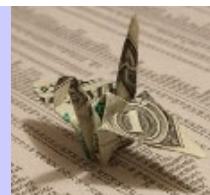
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Thank You to Our Sponsors and Speakers!



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- Includes sponsorship of available break.
- Includes 4 conference registrations.
- Includes list of attendees with contact information.

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- 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.



Crane's Bond Fund Symposium Thanks to Our 2025 Sponsors!



Crane's Money Fund Symposium 2025

June 23-25, 2025

Boston, Mass.



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 in Newport Beach, Calif.

Call the **Hyatt Regency in Newport Beach, Calif.** at **949-729-1234** in order to secure the conference rate of **\$259** (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.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 California in March 2025!

