



# 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:

Mark your calendars 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 next year 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 day-and-a-half event and materials, plus meals and refreshments. **Sponsorship packages** are **\$3K, \$4K and \$5K**. We hope you have a great show! Sincerely, **Pete Crane, Crane Data**

## Bond Fund Symposium Conference Agenda

### Thursday, March 19

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, **UBS Asset Mgmt.**

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 I.M.**

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**

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

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

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**

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

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

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

**Louis Rosenbaum**, Associate, **Dechert LLP**

**Shelly Antoniewicz**, Chief Economist, **ICI**

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

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

sponsored by **UBS Asset Management**

11:30-12:00pm **ETF Index & Near-Cash ETF Trends**

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

12:00-12:30pm **Bond Fund Data & Information**

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

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

## Bond Fund Symposium Sponsors & Exhibitors

**Northern Trust Fitch Ratings Morgan Stanley I.M. J.P. Morgan A.M. Bloomberg Intelligence**

**Dreyfus UBS Asset Mgmt. Payden & Rygel J.P. Morgan Securities Mayer & Brown GLMX**

**Dechert Northcross Capital PIMCO Wells Fargo Securities Crane Data**

Thank You to Our Sponsors and Speakers!



# Bond Fund Symposium

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

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

## Crane's Bond Fund Symposium Sponsorship Opportunities

### Bronze Sponsor - \$3,000

- Recognition in conference brochure, website and program.
- Includes sponsorship of break.
- Includes 2 conference registrations.
- Includes list of attendees.

### Gold Sponsor - \$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.



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



**FitchRatings**

**J.P.Morgan**  
ASSET MANAGEMENT

**Morgan Stanley**  
INVESTMENT MANAGEMENT



**Bloomberg  
Intelligence**



**Payden & Rygel**  
*Investment Management*

**NORTHCROSS**

**J.P.Morgan**

**MAYER|BROWN**

**GLMX**  
GLOBAL LIQUID MARKETS

**Dechert**  
LLP

**PIMCO**



### Silver Sponsor - \$4,000

- 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.

**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

110 Turnpike Rd. #213  
Westborough, MA 01581 USA  
+1-508-439-4419

<http://www.cranedata.com>

### 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 \$XXX (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](http://www.bondfundsymposium.com) or contact Peter Crane (508-439-4419 or [pete@cranedata.com](mailto:pete@cranedata.com)) or Natielli Mendes ([nmendes@cranedata.com](mailto:nmendes@cranedata.com) or 508-870-2918) with any questions or requests. We hope to see you in Boston in March 2026!

