



Bond Fund Symposium

Our 6th annual event for bond mutual fund managers, professionals and servicers.

March 23-24, 2023 • Hyatt Regency Boston • Boston, Mass.

Crane's Bond Fund Symposium 2023

Dear Bond Fund & Fixed Income Professional:

Please join us for **Bond Fund Symposium 2023**, which will take place **March 23-24, 2023** at The Hyatt Regency in Boston, Mass.! After a rough year in the bond fund market, we hope to do some commiserating and rebounding in Boston 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 2-day event and materials, plus meals and refreshments. Sponsorship packages are **\$3K, \$4K and \$5K**. We hope to see you there! Sincerely, **Pete Crane**, President, **Crane Data**

Bond Fund Symposium Conference Agenda

Thursday, March 23

9:10-9:20am **Welcome to Bond Fund Symposium 2023**

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

9:20-10:10am **Ultra-Shorts: Yield Is Back After Rough Year**

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

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

Jerome Schneider, Managing Director, **PIMCO**

10:10-11:00am **Regulatory Update: Bond Fund Issues '23**

Aaron Withrow, Partner, **Dechert LLP**

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

sponsored by **Allspring Global**

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

Brian McMullen, ETF Strategist, **Invesco**

James McNerny, MD & Portfolio Manager, **J.P. Morgan A.M.**

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**

Julian Potenza, Portfolio Manager, **Fidelity Investments**

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

2:10-3:00pm **Ultra-Shorts, LGIPs & Bond Fund Ratings**

Peter Gargiulo, Director, **Fitch Ratings**

Michael Masih, Director, **S&P Global Ratings**

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

sponsored by **UBS Asset Management**

3:30-4:15pm **Government Fund, ABS & European Briefs**

Sue Hill, Senior Portfolio Manager, **Federated Hermes**

Laura Mayfield, Sr. Portfolio Manager, **Fort Washington IA**

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

4:15-5:00pm **Major Issues in Fixed-Income Investing**

Moderator: **Logan Miller**, Credit Strategist, **Wells Fargo**

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

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

5:00-6:00pm **Cocktails**

sponsored by **Northern Trust Asset Mgmt.**

Friday, March 24

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

sponsored by **GLMX**

9:00-10:00am **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**

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

Shelly Antoniewicz, Sr Director, **Investment Co. Institute**

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

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

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

11:30-12:20pm **Money Funds & Conservative Ultra-Shorts**

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

Kerry Pope, Director Inst PM, **Fidelity Investments**

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

12:20-1:00pm **ESG & Sustainable Bond Fund Update**

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

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

Bond Fund Symposium Sponsors & Exhibitors

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

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Bronze Sponsor - \$3,000

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- 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 - \$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 Our 2023 Sponsors!



Crane's Money Fund Symposium 2023

June 21-23, 2023

Atlanta, Ga.



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 \$229 (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.

