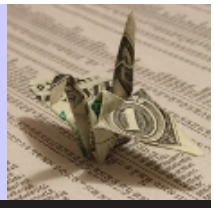
CRANE DATA
measuring money markets

Conference for Bond Fund Managers and Professionals

Bond Fund Symposium

Our 10th annual event for bond mutual fund managers, professionals and servicers.



March 22-23, 2027 • Loews Philadelphia Hotel • Philadelphia, Pa.

Crane's Bond Fund Symposium 2027

Dear Bond Fund & Fixed Income Professional:

Please join us for ***Bond Fund Symposium 2027***, which will take place ***March 22-23, 2027*** at **The Loews Philadelphia Hotel in Philadelphia, Pa**.! Thanks to our speakers, sponsors and attendees from last year, and we hope to see you in Philly!

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 welcome feedback! Sincerely, ***Pete Crane, Crane Data***

Bond Fund Symposium Conference Agenda

Monday, March 22

9:10-9:20am **Welcome to Bond Fund Symposium 2027**
Peter Crane**, President & Publisher, **Crane Data
9:20-10:10am **Ultra-Short Bond Fund Update: Sweet Spot**
Richard Mejzak**, Managing Director, **BlackRock
Thanh Nguyen**, Senior Portfolio Manager, **Vanguard
Pankaj Vohra**, Managing Director, **J.P. Morgan Securities
10:10-11:00am **Regulatory Update: Bond Fund Issues '27**
Geena Marzouca**, Attorney, **Stradley Ronon
Louis Rosenbaum**, Associate, **Dechert LLP
11:00-11:30am **Coffee Break**
sponsored by ***Capitolis***
11:30-12:20pm **ETF Index & Near-Cash ETF Trends**
Steven Johnson**, Associate Director, **Fitch Ratings
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.
Dave Rothweiler**, Portfolio Manager, **UBS Asset Mgmt
Jerome Schneider**, Managing Director, **PIMCO
2:10-3:00pm **Separately Managed Accts & Stable Value**
Kelsey Bosshard**, Portfolio Manager, **RBC Global A.M.
Kevin Calabro**, VP, Sr Prod Specialist, **Franklin Templeton
Steve Johnson**, Senior Portfolio Manager, **SVB Asset Mgmt
3:00-3:30pm **Refreshments**
sponsored by ***Northern Trust Asset Mgmt***
3:30-4:15pm **Local Govt Pools & Sustainable Bond Funds**
Henry Shilling**, Founder, **Sustainable Res & Analysis
Speaker TBD
4:15-5:00pm **Core & Intm-Term Bond Fund Issues**
Matt Brill**, Senior Analyst, **S&P Global Ratings
James Palmieri**, Managing Director, **State Street IM
5:00-7:00pm **Cocktails**
sponsored by ***Northcross Capital***

Tuesday, March 23

8:00-9:00am **Breakfast**
sponsored by ***Bloomberg Intelligence***
9:00-10:00am **Bond Market Strategists: Rates & Returns**
Mark Cabana**, Director, Head of Rates, **BofA Securities
Mike Cloherty**, Head of US Rates Strategy, **CIBC
Will Hoffman**, US Rates Strat, **Bloomberg Intelligence
10:00-11:00am **State of the Bond Fund Marketplace**
Lei Li**, Senior Economist, **Investment Company Institute
Peter Crane**, President & Publisher, **Crane Data
11:00-11:30am **Break**
sponsored by ***UBS Asset Management***
11:30-12:15pm **Money Funds & Conserv Ultra-Shorts**
Peter Crane**, President & Publisher, **Crane Data
Morten Olsen**, Head of Customized F-I, **Northern Trust
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

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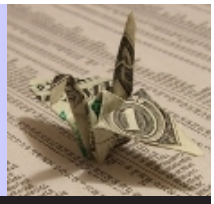
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- Includes sponsorship of available break.
- Includes 2 conference registrations.
- Includes list of attendees.

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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 DATA measuring money markets

Crane's Money Fund Symposium 2027 **June 23-25, 2027** ***Philadelphia, 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.

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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 $219 (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. **We hope to see you in Philadelphia in March!**



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