



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:

Please join us 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 again 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 day-and-a-half event and materials, plus meals and refreshments. **Sponsorship packages** are **\$3K, \$4K and \$5K** and speaking slots are still available. Sincerely, **Pete Crane, Crane Data**

Bond Fund Symposium Conference Agenda

Thursday, March 19

9:10-9:20am **Welcome to Bond Fund Symposium 2026**

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

9:20-10:10am **Ultra-Short Bond Fund Update: Spring Break**

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

Jerome Schneider, Managing Director, **PIMCO**

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

Lei Li, Senior Economist, **Investment Company Institute**

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

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

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

11:30-12:20pm **Bond Market Strategists: Rates & Returns**

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

Will Hoffman, Senior Rate Strategist, **Bloomberg Intelligence**

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.**

Richard Mejzak, Managing Director, **BlackRock**

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

2:10-3:00pm **LGIPs, SMAs & Stable Value Funds**

Kevin Calabro, VP, Sr. Product Specialist, **Franklin Templeton**

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

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

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

sponsored by **Dreyfus**

3:30-4:15pm **Long-Term & Core Bond Fund Issues**

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

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

4:15-5:00pm **ETF Index & Near-Cash ETF Trends**

Marcel Benjamin, VP, **State Street SPDR Fixed-Inc. Group**

James Palmieri, Managing Director, **State Street Inv Mgmt**

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

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**

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

10:00-11:00am **Regulatory Update: BF Issues '26**

Jamie Gershkow, Partner, **Stradley Ronon**

Louis Rosenbaum, Associate, **Dechert LLP**

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

sponsored by **UBS Asset Management**

11:30-12:15pm **Sustainable & European Bond Fund Update**

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

John Hunt, Partner, **Sullivan & Worcester LLP**

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

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.

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.

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



Crane's Money Fund Symposium 2026

June 24-26, 2026

Jersey City, NJ



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 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. We hope to see you in Boston in March 2026!

