

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 2026

Dear Bond Fund & Fixed Income Professional:

Mark your calendars 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 2026**

Peter Crane, President & Publisher, Crane Data

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

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

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 **Capitolis**

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

Mark Cabana, Director, Head of Rates, BofA Securities

Mike Cloherty, Head of US Rates Strategy, J.P.

Will Hoffman, US Rates 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 Mezzak, Managing Director, BlackRock

Dave Rothweiler, Portfolio Manager, UBS Asset Mgmt

2:10-3:00pm **Separately Managed Accounts & Portfolios**

Moderator: John Donohue, MD, RBC Global Asset Mgmt.

Kelsey Bosshard, Portfolio Manager, RBC Global A.M.

Steve Johnson, Senior Portfolio Manager, SVB Asset Mgmt.

Lance Pan, Director Inv. Research, Capital Advisors Group

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

sponsored by **Fidelity Investments**

3:30-4:15pm **Stable Value, Municipal & LGIP Issues**

Kevin Calabro, VP, Sr. Prod. Specialist, Franklin Templeton

Steven Johnson, Associate Director, Fitch Ratings

Morten Olsen, Head of Customized F-I, Northern Trust A.M.

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

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

Rahul Ghai, Senior Analyst, S&P Global Ratings

James Palmieri, Managing Director, State Street Inv Mgmt

5:30-7:00pm **Cocktails**

sponsored by **Northern Trust Asset Mgmt.**

Tuesday, March 23

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

sponsored by **Bloomberg Intelligence**

9:00-10:00am **Money Funds & Conservative Ultra-Shorts**

Peter Crane, President & Publisher, Crane Data

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**

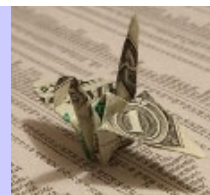
Peter Crane, President & Publisher, Crane Data

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

Bond Fund Symposium Sponsors & Exhibitors

**Northern Trust UBS Asset Mgmt. Fitch Ratings J.P. Morgan A.M. Bloomberg Intelligence
Capitolis Fidelity Investments Mayer & Brown Dreyfus J.P. Morgan Securities Crane Data
Dechert Northcross Capital GLMX PIMCO Morgan Stanley I.M. Payden & Rygel**

Thank You to Our Sponsors and Speakers!



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Crane's Bond Fund Symposium Sponsorship Opportunities

Bronze Sponsor - \$3,000

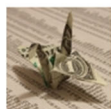
- Recognition in conference brochure, website and program.
- Includes sponsorship of available break.
- Includes 2 conference registrations.
- Includes list of attendees.

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 lunch, breakfast or cocktails.
- Includes 5+ conference registrations.
- Includes list of attendees with contact information.



Crane's Bond Fund Symposium Thanks to Our 2026 Sponsors!



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

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

