

**EFFAS**The European Federation
of Financial Analysts Societies

EFFAS SUMMER SCHOOL PROGRAMME 2023

EUROPE: STRETCHING CAPITAL MARKETS FOR GROWTH

JULY 6, 2023

08:45-9:30 Registration & Welcome Coffee

09:30-10:00 Key Note

Dr. Jesús López Zaballos, EFFAS Chairman, Spain.

Mrs. Clara Raposo, Deputy Chairman at Bank of Portugal, Portugal.

Dr. Manuel Puerta Da Costa, Chairman of APAF, Portugal.

10:00-10:30 Key Note

The macro environment and ESG

Mr. Fritz Mostboeck, CEFA®, CESGA®,

Head of Group Research/ Erste Group, Chairman OVFA, Austria.

10:30-11:00 Key Note

The European Capital Markets Union: Why are equity capital markets so important for Europe?

Mr. Thorsten Müller, Managing partner at Lighthouse Corporate Finance GmbH., Chair of DVFA, Germany.

The EU listing act & tax discrimination of equity.

Dr. Norbert Kuhn, Deputy Head Capital Markets at Deutsches Aktieninstitut, Germany.

11:00-11:30 Coffee Break

11:30-12:45 Key Note and Panel Discussion

The importance of the insurance sector in European equity and credit markets

Dr. Carsten Zielke, owner of Zielke Research Consult GmbH. and member of the EFFAS CFR, Germany.

Europe's need for the Return of the insurance industry as an equity investor

Mr. Patrick Nielsen, Deputy General Manager at Mapfre A.M., Spain.

Dr. Carsten Zielke, owner of Zielke Research Consult GmbH and member of the EFFAS CFR, Germany.

Ms. Isabel Castelo Branco, CEO, BPI Vida e Pensões, Portugal.

Mr. Thorsten Müller (moderator), Managing partner at Lighthouse Corporate Finance GmbH. Chair of DVFA, Germany.

12:45-13:45 Lunch Break

13:45-14:15 Key Note

ESMA's Role in fostering the European Capital Markets Union

Ms. Isabelle Grauer-Gaynor, Head of Corporate Finance and Reporting, ESMA, France.

14:15-15:00 Panel Discussion

The European Capital Markets Union: Where do we go?

Ms. Isabelle Grauer-Gaynor, Head of Corporate Finance and Reporting, ESMA, France.

Dr. Norbert Kuhn, Deputy Head Capital Markets at Deutsches Aktieninstitut, Germany.

Mr. Thorsten Müller, Managing partner at Lighthouse Corporate Finance GmbH. Board Member of EFFAS, Chair of DVFA, Germany.

Mr. Hans Buysse (moderator), EFRAG Administrative Board President, Chair of ABAF, Belgium.

15:00-15:30 Coffee Break

15:30-17:30 Key Note & Panel Discussion

Asset Management, The Ever Changing Industry

Mr. Jorge Sousa Teixeira, CEO BPI Asset Management, Portugal.

Asset Management, after thirty years of declining rates, what are the implications of the new interest environment?

Mr. João Pratas, APFIPP President, Portugal.

Dr. René Nicolodi, Head of Equities & Asset Mgt. at Swisscanto Invest. Board member at the Swiss SSF, Switzerland.

Mr. Jorge Sousa Teixeira, CEO BPI Asset Management.

CIO round table: Where do we go from here?

Mr. Gonzalo Rengifo, Head of Iberia & Latam at Pictet Asset Management, Spain.

Mr. Roger Peeters, pfp Advisory GmbH, member of the Board of DVFA, Germany.

Mr. Sebastián Velasco, Country Head, Spain & Portugal, Fidelity International, Spain.

Mr. Stefan Hofrichter, Allianz GI's Head of Economics & Strategy, Germany.

Dr. Manuel Puerta Da Costa (moderator), Chairman of APAF, Portugal.

17:30 Closing remarks of day one.

GALA DINNER 19:45

Invited Guest: Mr. LUIS LAGINHA DE SOUSA, Chairman of the Portuguese Securities Market Commission (CMVM)

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Mr. Hans Buysse, EFRAG Administrative Board President, Chair of ABAF, Belgium.



Mr. Paulo Câmara, Partner at Sérvulo Lawyers, Portugal.



Ms. Isabel Castelo Branco, CEO, BPI Vida e Pensões, Portugal.



Ms. Barbara Cohen, Executive Director at Scope Ratings, Germany.



Mr. Angelo Dipasquale, Co-Head of Fixed Income Desk at Equita, Italy.



Mr. Tom Dodd, Team Leader of Sustainability Reporting at the European Commission, Belgium.



Mr. João Duque, ISEG Dean, Portugal.



Mr. Alfredo Echevarría, Lighthouse-IEA, Spain.



Ms. Isabelle Grauer-Gaynor, Head of Corporate Finance and Reporting, ESMA, France.



Mr. Davide Grignani, Chair of the AIAF, Italy.



Mr. Stefan Hofrichter, Allianz GI's Head of Economics & Strategy, Germany.



Dr. Norbert Kuhn, Deputy Head Capital Markets at Deutsches Aktieninstitut, Germany.



Dr. Jesús López Zaballos, EFFAS Chairman, Spain.



Mr. Stefan Maxian, Director at Raiffeisen Bank International's Equity Capital Markets team, Austria.



Mr. Fritz Mostboeck, CEFA®, CESGA®, Head of Group Research/ Erste Group, Chairman OVFA, Austria.



Mr. Thorsten Müller (moderator), Managing partner at Lighthouse Corporate Finance GmbH. Chair of DVFA, Germany.



Mr. Markus Neuding, Executive Vice President, Spotlight Group AB, Sweden.



Mr. Patrick Nielsen, Deputy General Manager at Mapfre A.M., Spain.



Dr. René Nicolodi, Head of Equities & Asset Mgt. at Swisscanto Invest. Board member at the Swiss SSF, Switzerland.



Mr. Roger Peeters, pfp Advisory GmbH, member of the Board of DVFA, Germany.



Mr. João Pratas, APFIPP President, Portugal.



Dr. Manuel Puerta Da Costa, Chairman of APAF, Portugal.



Mrs. Clara Raposo, Deputy Chairman at Bank of Portugal, Portugal.



Mr. Gonzalo Rengifo, Head of Iberia & Latam at Pictet Asset Management, Spain.



Ms. Teresa Royo Luesma, Director of Sustainability and Governance, KPMG Spain.



Mr. Abel Sequeira Ferreira, Executive Director of AEM - Portuguese Issuers Association and Board Member of EuropeanIssuers, Portugal.



Mr. Jorge Sousa Teixeira, CEO BPI Asset Management.



Mr. Sebastián Velasco, Country Head, Spain & Portugal, Fidelity International, Spain.



Dr. Carsten Zielke, owner of Zielke Research Consult GmbH. and member of the EFFAS CFR, Germany.



EFFAS

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The international network for your professional development

About us

EFFAS - The Think Tank

EFFAS stands as a prominent think tank of distinguished financial experts. Since 1962, EFFAS has continually played a role in shaping the financial landscape.

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EFFAS Commission on
Environment, Social and
Governance (CESG)

EFFAS Commission
on Financial
Reporting (CFR)

EFFAS Commission on
Training & Qualification
(TQC)



EFFAS

The European Federation
of Financial Analysts Societies

EFFAS' **mission** is to lead investment professionals in the development of their profession aligned with the EFFAS Code of Conduct so they have a positive social impact.

1. **Sharing** market expert opinions.
2. **Dialogue** with financial institutions.
3. **Integration** of the non-financial indicators and ethics in investment decisions.
4. **Training** to enhance the skills, expertise and continuous professional development



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JULY 7, 2023

8:30-09:00 Welcome Coffee

09:00-10:30 Key Note & Panel Discussion

**The future development of corporate reporting:
GRI/ISSB – EFRAG CSRD.**

Mr. Tom Dodd, Team Leader of Sustainability Reporting
at the European Commission, Belgium.

Mr. Hans Buysse, EFRAG Administrative Board
President, Chair of ABAF, Belgium.

**ESG Round table: How do corporates handle the
challenge?**

Mr. Paulo Câmara, Partner at Sérvulo Lawyers,
Portugal.

Ms. Teresa Royo Luesma, Director of Sustainability and
Governance, KPMG Spain.

Mr. João Duque, ISEG Dean, Portugal.

Mr. Hans Buysse (moderator), EFRAG Administrative
Board President, Chair of ABAF, Belgium.

10:30-11:15 Key Note and Panel Discussion

SME equity and credit markets in Europe

Mr. Stefan Maxian, Director at Raiffeisen Bank
International's Equity Capital Markets team, Austria.

Mr. Angelo Dipasquale, Co-Head of Fixed Income Desk
at Equita, Italy.

Mr. Abel Sequeira Ferreira, Executive Director of AEM -
Portuguese Issuers Association and Board Member of
European Issuers, Portugal.

Ms. Barbara Cohen, Executive Director at Scope
Ratings, Germany.

Mr. Thorsten Müller (moderator), Managing partner at
Lighthouse Corporate Finance GmbH, Chair of the
Board of DVFA, Germany.

11:15-11:45 Coffee Break

11:45-12:45 Key Note

SME Best Practice

The Italian PIR Programme – small and mid caps.

Mr. Davide Grignani, Chair of the AIAF, Italy.

The Nordic experience - nano and micro caps.

Mr. Markus Neuding, Executive Vice President, Spotlight
Group AB, Sweden.

The Spanish Research Project

Mr. Alfredo Echevarría, Lighthouse-IEA, Spain.

12:45-13:30 Panel Discussion

How to develop European SME Capital Markets

Mr. Markus Neuding, Executive Vice President, Spotlight
Group AG, Sweden.

Mr. Davide Grignani, Chair of the AIAF, Italy.

Mr. Alfredo Echevarría, Lighthouse-IEA, Spain.

Mr. Thorsten Müller (moderator), Managing partner at
Lighthouse Corporate Finance GmbH. Chair of the Board of
DVFA, Germany.

13:30-13.45 Closing Remarks

13:45-14.30 Closing Lunch

14:45 Departure of the bus to airport.

**The ISEG Lisbon School of Economics & Management: Rua do
Quelhas 6, 1200-781 Lisboa, Portugal.**

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