

Godliman Press Digest - 17 - 23 May 2018

## Asset Management Executive Search

Godliman works on business critical hires for Asset Management Companies



### Q1 DISTRIBUTION NEWSLETTER 2018

Godliman is now producing a one-page summary highlighting trends in the Distribution space that our readers may find interesting. This is a by-product of our network of market sources.

Please click below to see the first edition.

[Godliman Partners Q1 2018 Distribution Newsletter](#)

**Total Number of  
Contacts: 42**

#### SECTION 1:

#### MOVER (NO OF CONTACTS 28)

**ALLIANZ GLOBAL INVESTORS**

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### SALARY SURVEY 2018

Please take a moment to contribute to our 2018 Salary Survey.

Everyone who contributes to the survey will be sent the final results, allowing you to benchmark yourself against the overall market. So, please take a couple of minutes to submit your own details to our secure web

**John Schroer**, EX-Head of Research: Healthcare  
CW 17 May 18: Schroer has left Allianz Global Investors, where he was Head of Healthcare sector Research. Peter Pirsch will take over as lead Portfolio Manager on the Allianz GI Health Sciences fund. Schroer's future destination is not yet known.

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#### **APG INVESTMENTS**

**Kim Liu**, Fixed Income Fund Manager  
IE 18 May 18: Liu has moved to APG as a Senior Portfolio Manager, covering Treasuries and Inflation-Linked Bonds. He will report to Sandor Steverink, who oversees APG's Treasuries and Inflation-Linked Bonds team. He was formerly a Senior Fixed Income Strategist at Dutch financial group ABN Amro. Before that, he held the role of government Bond Trader within the company. Liu also worked at the Dutch State Treasury Agency.

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#### **ARTEMIS INVESTMENT MANAGEMENT**

**Jasper Berens**, Head of Distribution  
CW 23 May 18: Berens has moved to Artemis Investment Management as Head of Distribution. He will replace Dick Turpin, who is set to retire at the end of the year and has been responsible for sales and distribution at Artemis since 2002. Berens will take over in October 2018. He was formerly at JP Morgan Asset Management as Country Head of the UK.

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#### **BLUEBAY ASSET MANAGEMENT**

**Stephen Thariyan**, Co-Head of Developed Markets  
CW 23 May 18: Thariyan has moved to BlueBay Asset Management as Co- Head of Developed Markets. He will be based in London and will report to Raphael Robelin, Chief Investment Officer. Thariyan was formerly at Janus Henderson Global Investors as Global Head of Credit. Before that, he was at Rogge Global Partners. Prior to that, he held roles at Natwest and Chevron.

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#### **BNP PARIBAS INVESTMENT PARTNERS**

form by clicking the link below.

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#### **FURTHER READING**

Please visit the Godliman Blog for more details on movers in the market.

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##### **Stuart Chilvers**,

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##### **James Smith**

Multi-Asset,  
Equities  
Distribution

**Maude Rivierre Bianchi**, ETF Product Specialist

IE 17 May 18: Rivierre Bianchi has moved to BNP Paribas Asset Management as a Product Specialist. Based in Paris, she will report to Bertrand Alfandari, Head of ETF Development.

**Chiara Solazzo**, ETF & Index Solution Sales

IE 17 May 18: Solazzo has moved to BNP Paribas Asset Management as a member of the ETF and Index Solutions Sales team. Based in Milan, she will report to Sabrina Principi, Head of ETF Sales for Italy and Spain.

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**Edward Walton**

Fixed Income  
North America

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**CAPITAL INTERNATIONAL GROUP**

**Sigrid Rosemeyer**, Institutional Sales: Germany

IE 18 May 18: Rosemeyer has moved to Capital Group as an Institutional Salesperson for Germany. She is responsible for expanding Institutional business in Germany from Frankfurt. She will report to Henning Busch, Managing Director for Institutional clients in Germany and Austria. Rosemeyer was formerly at Helaba Invest in Frankfurt as an Institutional Sales Director for Institutional clients in Germany. Before that, she was at Bank of America Merrill Lynch, advising Institutional clients on asset management products across multiple asset classes.

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**CAZENOVE CAPITAL MANAGEMENT**

**Ahmet Feridun**, Head of Investment Research

CW 22 May 18: Feridun has moved to Cazenove Capital as a Manager of investment research, reporting to Chief Investment Officer, Caspar Rock. Feridun was formerly Head of Manager Selection at Stonehage Fleming.

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**DNCA FINANCE**

**Luca Bollani**, Retail Client Relations: Italy

IE 21 May 18: Bollani has moved to DNCA Investments as a Senior Client Relationship Manager, covering Retail. Based in Milan, he will report to DNCA's Italy Managing Director, Enrico Trassinelli. Bollani will be responsible for the Retail distribution of the group in Italy. He was formerly at BNY Mellon, where he was responsible for Retail distribution.

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## DUNAS CAPITAL

**Alberto Diez**, Fixed Income Fund Manager

IE 23 May 18: Diez has moved to Dunas Capital as a Senior Fixed Income Fund Manager. He will report to Dunas Capital Fixed Income Director, Jose Maria Lecube and will be responsible for exploring new investment opportunities through the different Fixed Income assets for the firm's funds. Diez has formerly worked at Liberbank Gestion and Aviva Spain.

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## FIRST STATE INVESTMENTS

**Nick Grant**, Infrastructure Debt Fund Manager

IPE 17 May 18: Grant has moved to First State Investments as Director of Infrastructure investments within the European Direct Infrastructure team. He was formerly CEO of Severn Trent Services for the UK, Ireland and Italy. Before that, he worked for Centrica and British Gas.

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## GENERALI INVESTMENTS EUROPE

**Antonio Tedesco**, Head of ALM & Strategic Asset Allocation

IPE 17 May 18: Tedesco has moved to Generali Investments as Head of group Asset Liability Management and Strategic Asset Allocation. He will report to the Head of Group Investment Management Solutions, Bruno Servant. Tedesco was formerly at PosteVita, where he was Head of Asset Management and Head of Capital Management. Before that, he was Head of Finance. Before that, he held senior positions at JP Morgan Chase Bank in New York and London.

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## LOMBARD ODIER

**Juan Mendoza**, Equity Fund Manager

FT 21 May 18: Mendoza has moved to Lombard Odier Investment Management as a Senior Equity Fund Manager after moving from Credit Suisse Asset Management. LOIM will launch a Global Prestige Equity fund, managed by Mendoza, that will absorb the EURO 236m in assets that he previously ran in this strategy while at CSAM.

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## MAN INVESTMENTS

### **Marvin Caze**, Equity Fund Manager

IE 18 May 18: Caze has moved to Man GLG as an Equity Fund Manager focusing on Energy, based in New York. He will report to Fabian Blohm and Neil Mason, Co-Heads of European Long-Short Equity at Man GLG. Caze was formerly at Citadel, where he covered the Energy sector with a focus on US oil and gas. Before that, he spent seven years at Caisse de Depot et Placement de Quebec, where he built and co-managed a market neutral portfolio and developed expertise in various energy sub-sectors. Prior to that, he began his career at Citigroup.

### **Graham Stafford**, Equity Fund Manager

IE 18 May 18: Stafford has moved to Man GLG as an Equity Fund Manager focusing on Healthcare, based in London. He will report to Fabian Blohm and Neil Mason, Co-Heads of European Long-Short Equity at Man GLG. Stafford was formerly at Ivaldi Capital, where he worked to develop and implement a market neutral healthcare strategy. Before that, he was at Mubadala Capital. Prior to that, he began his career at DE Shaw in New York.

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## MARTIN CURRIE

### **Zehrid Osmani**, Equity Fund Manager

CW 22 May 18: Osmani has moved to Martin Currie as an Equity Portfolio Manager to overseeing the Global Long-Term Unconstrained team. In his new role, Osmani will be based in Edinburgh and will report to John Pickard, Head of Investment. Osmani was formerly at BlackRock in February this year after more than a decade, during which time he had overseen several multi-billion dollar Long/Short Equity funds.

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## MSCI

### **Jack Lin**, Head of Client Coverage: Asia Pacific

FT 21 May 18: Lin has moved to MSCI as Head of Client Coverage for the Asia- Pacific region. He was formerly at Amundi, where he was Head of South Asia.

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## **NAO SUSTAINABLE ASSET MANAGEMENT**

**Pablo Cano Escoriaza**, Equity Fund Manager

IE 21 May 18: Cano Escoriaza has moved to Nao Sustainable Asset Management as an Investment Director, based in Valencia, Spain. He was formerly an Equity Portfolio Manager at Bankinter. Prior to that, he worked at Aviva as an Equity Portfolio Manager in Spain.

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## **NEPTUNE INVESTMENT MANAGEMENT**

**Kunal Desai**, EX-Equity Fund Manager

CW 17 May 18: Desai has left Neptune Investment Management, where he was an Equity Fund Manager. His future destination is not yet known.

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## **NEWTON INVESTMENT MANAGEMENT**

**Andrew Warwick**, Multi-Asset Fund Manager

IE 22 May 18: Warwick will move to Newton Investment Management on 30 July 2018 within the Real Return team. He will report to Suzanne Hutchins. Warwick will work as co-lead Portfolio Manager on the Newton and BNY Mellon Real Return strategies, alongside co-lead Portfolio Managers Suzanne Hutchins and Aron Pataki. Warwick was formerly at BlackRock, where he was Co-Manager of the BlackRock Dynamic Diversified Growth fund, as well as being Manager of the BGF Flexible Multi-Asset fund, the BlackRock Balanced Growth fund and BlackRock Balanced Managed fund.

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## **RATHBONE INVESTMENT MANAGEMENT**

**Tim Shaw**, Senior Wealth Manager

CW 23 May 18: Shaw has moved to Rathbone Brothers as an Investment Director. He was formerly at HSBC Global Asset Management as Regional Head for London. Before that, he was at Killik & Co. Prior to that, he worked at Charles Stanley.

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## **RBC GLOBAL ASSET MANAGEMENT**

**Roland Schmidt**, Head of Sales: Germany

IE 22 May 18: Schmidt has moved to RBC Global Asset Management as Director of EMEA Business Development. Based in Frankfurt, he will be focused on the distribution of RBC GAM's investment strategies, helping to build and expand RBC GAM's presence in the German Institutional market. He was formerly at Carmignac Gestion, where he was Head of Institutional and Wholesale for Germany and Austria for four years. Before that, he held roles at Fidelity Investments, Baring Asset Management and M&G Investments.

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**ROBECO INVESTMENT MANAGEMENT**

**Bart Oldenkamp**, Head of Investment Solutions

IE 23 May 18: Oldenkamp will move to Robeco in July 2018 as Head of Investment Solutions. In this role, he will be responsible for further expanding Robeco's investment solutions business, which includes services such as Fiduciary Management and Multi-Asset solution products. He was formerly at NN Investment Partners, where he was a Managing Director for Integrated Client Solutions. Before that, he headed the Dutch office of Cardano. Prior to that, he worked at ABN Asset Management as Global Head of LDI & Structuring and Product Specialist Structured Asset Management in the US.

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**RUSHBROOKE INVESTISSEMENTS**

**Patrick Matti**, Equity Fund Manager

IE 22 May 18: Matti has moved to Rushbrooke Investissements as a Senior Fund Manager. He was formerly at Societe Generale Private Banking in Geneva between 2007 and 2016, as a Senior Financial Analyst making recommendations on European and US equities to the firm's private clients, generating investment ideas and developing investment solutions. In 2013, he was appointed as a Senior Fund Manager, investing and advising private clients on a variety of asset classes. Before that, he was a Consultant and Financial Analyst at Credit Suisse.

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**SANLAM FOUR INVESTMENT MANAGEMENT**

**Daniel Szabo, Fund Manager**

IE 17 May 18: Szabo has moved to Sanlam Four Investment Management as a Fund Manager. He will report to Stuart McCann, Head of London Office at Sanlam Four Investment Management. Szabo was formerly at Oxford Capital, where he worked with high net worth private clients. Before that, he was an Associate Director at Tilney. Prior to that, he held various Private Client roles at Nationwide Building Society, Zurich and Bradford and Bingley.

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**T ROWE PRICE INTERNATIONAL****Saurabh Sud, Credit Fund Manager**

FT 21 May 18: Sud has moved to T Rowe Price as a Credit Fund Manager, based in Baltimore. He was formerly at PIMCO.

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**VONTOBEL ASSET MANAGEMENT****Philipp Hensler, EX-CEO: US**

IE 17 May 18: Hensler has left Vontobel Asset Management, where he was Chief Executive Officer for the US business. His future destination is not yet known.

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**XAIA INVESTMENT****Marc Decker, Multi-Asset Fund Manager**

IE 17 May 18: Decker has moved to XAIA Investment as a Multi-Asset Fund Manager. He had formerly Co-Founded and Executive Director of the Multi-Asset house SKALIS in Unterschleibheim. Before that, he was a Senior Fund Manager at MEAG. Prior to that, he was at DWS.

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**SECTION 2:****OTHER NEWS (NUMBER OF CONTACTS 14)**

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**AMUNDI ASSET MANAGEMENT**



**Federico Garofalo**, Institutional Sales: ETF, Indexing & Smart Beta

IE 23 May 18: Garofalo has moved to Amundi SGR as a Senior ETF Salesperson, also covering Indexing and Smart Beta. Prior to the merger, he was formerly at Pioneer Investment Management, where he was a Senior Institutional Salesperson for nearly 13 years. Before that, he worked as a Fund Manager at Pixel Investment Management from the Unicredit Group. Prior to that, he worked as a Fund Manager at ING Investment Management.

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#### **ARTEMIS INVESTMENT MANAGEMENT**

**Dick Turpin**, EX-Head of Distribution

CW 23 May 18: Turpin is set to retire at Artemis Investment Management. He is currently Head of Distribution at the firm and will retire later in the year. He is responsible for Sales and Distribution and will remain in charge until Jasper Berens takes over in October.

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#### **CANADA LIFE MANAGEMENT (UK)**

**Craig Rippe**, Head of Multi-Asset

CW 21 May 18: Rippe has been appointed as Head of Multi-Asset Funds. He will Co-Manage the company's range of Multi-Asset funds, which includes the Canlife Portfolio funds and the LF Canlife Managed 0%-35% fund, alongside David Marchant, the firm's Chief Investment Officer. Rippe will also continue with his existing roles on the Canlife UK Equity Income fund and the Canlife UK Equity and Bond Income fund, alongside Senior Fund Manager, Eugene O'Neill.

**Mike Willans**, Head of Equities: UK & Global

CW 21 May 18: Willans has been appointed as Head of Equities with responsibility for oversight of the Equities division, overseeing both the UK and International Equity teams. He was formerly Head of International Equities at the firm.

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#### **FIS GROUP**

**\_Company Record**

II 23 May 18: FIS Group has reached a deal to acquire North

Carolina-based Piedmont Investment Advisors. The combined company will manage more than USD 10 billion in assets when the deal closes during the third quarter of 2018. This is the first acquisition for FIS, which is based in Philadelphia and specializes in Global Small-Cap strategies. The firms have little overlap in product offerings: FIS invests in Global Small-Cap strategies in capacity strained areas, while Piedmont offers Active, Passive, and Structured-Beta Equity strategies, as well as Core Fixed Income management. The combination of FIS, which manages USD 5.6 billion in assets as of April 30 2018, and Piedmont, which has USD 4.7 billion under management, will give the resulting firm more than USD 10 billion in assets. Following the merger, Piedmont will operate as a fully-owned subsidiary of FIS. Williams will be the Chief Executive Officer of the combined companies, and will continue to work as FIS' Chief Investment Officer. Isaac Green will remain as President and Chief Investment Officer of Piedmont, which will continue to operate in Durham, North Carolina.

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## **GROUPAMA ASSET MANAGEMENT**

**Marie-Pierre Peillon**, Head of ESG Research & Strategy

IE 23 May 18: Peillon has been appointed as Head of Environmental, Social and Governance Research and Strategy. She was formerly Head of Research. In 2000, she was responsible for developing the Credit and Equity research unit of Groupama Asset Management.

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## **GWM INVESTMENT MANAGEMENT**

**\_Company Record**

FE 23 May 18: GWM Investment Management has taken a majority stake in Optimus Capital for an undisclosed sum. The two London-based firms will be based in the same offices while Optimus will retain its name, brand and continue to be run independently. The deal will see GWM add a suite of bespoke portfolio services to its investment offering. Optimus Capital is led by Martin Newson, former Head of European Equities at Credit Suisse.

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## **LYXOR ASSET MANAGEMENT**

**Roland Fischer**, Head of ETFs: Switzerland & Liechtenstein  
IE 22 May 18: Fischer has been appointed as Head of the ETF Business for German-speaking Switzerland and Liechtenstein. In this role, he will be responsible for both Institutional and Private Investors. Since 2014, he has also been responsible for the ETF business with private banks, family offices and wealth managers in Germany and Austria. Before that, in 2012, he took over the management of ETF sales for Institutional clients and since then has been able to significantly increase net inflows.

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## **MAYBANK ASSET MANAGEMENT GROUP**

### **\_Company Record**

Asiaasset 23 May 18: Maybank Asset Management Group (MAMG) says its 51 million ringgit (USD12.83 million) acquisitions of Kuala Lumpur-based Amanah Mutual and Singapore Unit Trust Ltd (SUTL) have been completed after receiving regulatory approvals. MAMG, a wholly-owned subsidiary of Malaysia's largest lender, Malayan Banking (Maybank), also announced the promotion of Badrul Hisyam Abu Bakar as its new Chief Executive Officer, responsible for overseeing Maybank's regional asset management business. The company acquired AMB for 16.12 million ringgit and SUTL for 34.88 million ringgit from Permodalan Nasional, Malaysia's largest fund manager. Mr. Badrul was formerly Head of MAMG's Malaysian Operations, which he joined as Chief Investment Officer in 2010. He became its CEO in 2014. That position has now been filled by Ahmad Najib Nazlan, who was formerly the CEO of Maybank's Islamic asset management subsidiary.

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## **MEAG MUNICH ERGO**

### **Philipp Waldstein, CEO**

IE 17 May 18: Waldstein has been appointed as Chief Executive Officer, effective 1 January 2019. He will replace Thomas Kabisch, who is retiring at the end of 2018. Waldstein is currently a member of the board of Management at MEAG, in charge of portfolio management. He has been in charge of portfolio management at MEAG since 2013.

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## **SCHRODERS**

## **\_Company Record**

FInews 24 May 18: Schroders has bolstered its financial technology capacity by acquiring a stake in a Singaporean digital wealth services firm, named WelInvest. Founded in 2015, the fintech firm provides end-to-end platforms for banks, asset managers, wealth managers and independent financial advisers. Completion of the investment is expected for June 2018.

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## **SEILERN INVESTMENT MANAGEMENT**

### **Peter Seilern-Aspang, CIO**

IE 23 May 18: Seilern-Aspang has been appointed as Chief Investment Officer replacing Raphael Pitoun. Seilern-Aspang was formerly Chairman and Director of Seilern Investment Management.

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## **VONTOBEL ASSET MANAGEMENT**

### **Charles Falck, Global COO**

IE 17 May 18: Falck has been appointed as Global Chief Operating Officer of Vontobel Asset Management. He was formerly Chief Operating Officer at the firm.

### **Thomas Wittwer, CEO: US**

IE 17 May 18: Wittwer has been appointed as Chief Executive Officer of the US entity of Vontobel replacing Philipp Hensler, who left the firm.

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