



CALASTONE
CONNECT FORUM
London

NAVIGATING THE NEXT ERA OF
ASSET MANAGEMENT
TUESDAY, 30 SEPTEMBER 2025

9:00 AM	<p>WELCOME NOTE</p> <p>Ross Fox, Head of EMEA, Calastone</p>
9:10 AM	<p>THE LONG VIEW: WHAT THE NEXT FIVE YEARS MEAN FOR ASSET MANAGEMENT</p> <p>An industry outlook session exploring the macro drivers shaping the industry, including technology, regulatory, geopolitical, and investor influences.</p> <p>Dean Frankle, MD & Partner, Boston Consulting Group Brian Godins, Chief Commercial Officer, Calastone</p>
9:35 AM	<p>PANEL DISCUSSION: ASSET MANAGEMENT 3.0 – WHAT IS NEXT FOR THE INDUSTRY</p> <p>A discussion on how the industry is evolving to serve the needs of the modern investor, covering changing distribution models, the role of generative AI in the future of advice, the impact of technology and innovation in powering Asset Management 3.0, and what the market may look like in 2030 and beyond.</p> <p>Moderator: Edward Glyn, Head of Global Markets, Calastone Panelists: Jonathan Curry, CIO UK & Global Liquidity, HSBC William Lucken, Global Head of Products, Janus Henderson Christopher Caspar, Chief Executive Officer, Edmond de Rothschild Simon Ellis, Professional Independent Chair and Non-Executive Director</p>
10:15 AM	<p>CALASTONE PRESENTATION: FROM INNOVATION TO IMPACT: HOW OUR TECHNOLOGY EMPOWERS TRANSFORMATION</p> <p>Calastone shares insights into the evolving technology landscape, highlighting how innovation is driving greater efficiency across the investment lifecycle, with a tech roadmap focused on scale, security, and efficiency, and products – from mutual funds, MMFs, and ETFs to DI – designed through its network and applications to drive client success.</p> <p>Robert Pokorny, Head of Engineering, Calastone</p>
10:35 AM	<p>COFFEE BREAK</p>

11:05 AM

FIRESIDE CHAT WITH MARTIN GILBERT

Senior level perspectives on the evolving investment landscape and perspectives from the 'neo-world'

Moderator: Edward Glyn, Head of Global Markets, Calastone
Panelist: Martin Gilbert, Chairman, Revolut

11:25 AM

PANEL DISCUSSION: CONVERGING FORCES: HOW TRADITIONAL AND DECENTRALISED FINANCE CAN EVOLVE TOGETHER

As decentralised and traditional finance converge, this session explores how established institutions are uniquely positioned to shape, scale, and stabilise the opportunity – combining trust, innovation, and infrastructure to build the future of finance.

Moderator: John Allan, Head of Innovation & Operations Unit, The Investment Association

Panelists:

Simon Keefe, Head of Digital Solutions, Calastone

Ed Patrick, Head of Business Alignment & Strategy, Technology Division, L&G Asset Management

Alastair Sewell, Senior Investment Director, Aviva

Natasha Benson, COO/CFO, Ownera

Colin Bennett, Head of Marketing & Client Experience, GAM

12:05 PM

FIRESIDE CHAT: LOOKING FORWARD TO - JULIEN HAMMERSON, CEO, CALASTONE AND NICK WRIGHT, CEO, SS&C GLOBAL INVESTOR AND DISTRIBUTION SOLUTIONS

Julien Hammerson, CEO, Calastone

Nick Wright, CEO, SS&C Global Investor and Distribution Solutions

12:25 PM

CLOSING REMARKS

Ross Fox, Head of EMEA, Calastone