



# Bond Fund Symposium

Our 8th annual event for bond mutual fund managers, professionals and servicers.

**March 27-28, 2025 • Hyatt Regency • Newport Beach, Calif.**

## Crane's Bond Fund Symposium 2025

Dear Bond Fund & Fixed Income Professional:

Mark your calendars for **Bond Fund Symposium 2025**, which will take place **March 27-28, 2025** at **The Hyatt Regency in Newport Beach, Calif.!** Thanks to those who supported our last show in Philadelphia, and please consider joining us in 2025.

**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 hope to see you in California! Sincerely, **Pete Crane, Crane Data**

## Bond Fund Symposium Conference Agenda

### Thursday, March 27

9:10-9:20am **Welcome to Bond Fund Symposium 2024**

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

9:20-10:10am **State of the Bond Fund Marketplace**

**Shelly Antoniewicz, Deputy Chief Economist, ICI**

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

10:10-11:00am **Ultra-Shorts: Staying Positive, Conserv**

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

**Richard Mejzak, Managing Director, BlackRock**

**Joseph D'Angelo, Managing Director, PGIM**

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

sponsored by **Capitolis**

11:30-12:20pm **ETF Index & Near-Cash ETF Trends**

**Bill Ahmuty, MD Head of SPDR F-I, State Street Global**

**James Palmieri, Managing Director, State Street Global**

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.**

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

**Jerome Schneider, Managing Director, PIMCO**

2:10-3:00pm **Long-Term & Core Bond Fund Issues**

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

**Priya Misra, Portfolio Manager, J.P. Morgan A.M.**

**Samuel Ramirez, Jr., President & CEO, Ramirez A.M.**

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

sponsored by **UBS Asset Management**

3:30-4:15pm **Money Funds & Conservative Ultra-Shorts**

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

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

4:15-5:00pm **Bond Market Strategists: Rates & Risks**

**Jay Barry, Head US Rates Strategy, J.P. Morgan Secs**

**Ira Jersey, Chief Rates Strategist, Bloomberg Intelligence**

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

sponsored by **Northern Trust Asset Mgmt.**

### Friday, March 28

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

sponsored by **GLMX**

9:00-10:00am **ESG & European Bond Fund Update**

**David Callahan, Head of Money Mks, Lombard Odier IM**

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

**Nicholas Tripodes, Senior VP & Sr PM, Federated Hermes**

10:00-11:00am **Regulatory Update: BF Issues '24**

**Aaron Withrow, Partner, Dechert LLP**

**Rebecca Rodrigues, Associate, Stradley Ronon**

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

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

11:30-12:30pm **Ultra-Shorts, LGIPs & Bond Fund Ratings**

**Steven Johnson, Associate Director, Fitch Ratings**

**Michael Masih, Director, S&P Global Ratings**

12:30-12:45pm **Bond Fund Data & Information**

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

**LAST YEAR'S AGENDA  
WATCH FOR THE 2025 CUT  
IN COMING MONTHS**

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

## Bond Fund Symposium Sponsors & Exhibitors

**Northern Trust GLMX Capitolis Morgan Stanley I.M. UBS Asset Mgmt. J.P. Morgan A.M.  
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Northcross Capital Dreyfus Euroclear Wells Fargo Securities Dechert Crane Data**

Thank You to Our Sponsors and Speakers!



# Bond Fund Symposium

Our 7th annual event for bond mutual fund managers, professionals and investors.

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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 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 2024 Sponsors!



Crane's Money Fund Symposium 2024

June 12-14, 2024

Pittsburgh, Pa.



### 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 Hyatt Regency in Newport Beach, Calif.

Call the **Hyatt Regency** in **Newport Beach, Calif.** at **949-729-1234** 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. 27**. For more information, visit the website

[www.cranesbfsymposium.com](http://www.cranesbfsymposium.com) or contact **Peter Crane** (508-439-4419; [pete@cranedata.com](mailto:pete@cranedata.com)) or **Natielli Mendes** (508-870-2918; [nmendes@cranedata.com](mailto:nmendes@cranedata.com)) with any questions or requests. We hope to see you in California next March!

