



VALENTINE THOMAS

— & PARTNERS —

People Moves | Investment Management EMEA

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Please see below a monthly update on the latest people moves within the EMEA investment management industry. Please do get in contact with the team if you would like to discuss any topics relating to talent in the investment or wealth management areas.

- **3i Group PLC** has announced that **Julia Wilson, group finance director**, has informed the Board that she intends to **retire** after the AGM in June 2022. Julia will be **succeeded by James Hatchley**, who is currently the 3i Group Strategy Director.
- **Aegon** has hired **Andy Dickson** to the newly-created role of **master trust strategic development director**.
- **AJ Bell** has named **Peter Birch** as its **chief financial officer**, who joins the firm from Deloitte LLP. Subject to FCA approval, Birch will join AJ Bell on July 1, 2022. In addition to his role as CFO, he will also join the **AJ Bell board** and **executive management board**.
- **AP2**, the Swedish pension fund, has hired **Erik Kleväng Callert** as **chief investment officer**. Callert will start in spring 2022 and succeeds **Hans Fahlin**, who decided to **leave** the pension fund after 11 years.
- **AQR's Christopher Palazzolo** has **left** his role as a **global distribution leader** after nearly 15 years at the investment manager.
- **Aviva Investors** has appointed **Huayin Liu** as **senior portfolio manager**, the firm has announced. Liu joins from Portuguese insurance firm UNA Seguros, where he was chief investment officer.
- **Blackstone Alternative Asset Management** has hired **David Ben-Ur** and **Atish Nigam** as **chief investment officers of its hedge fund and special situations units** respectively. Ben-Ur joins from CAM Capital, where he was CIO. Nigam most recently worked at Appaloosa Management, where he was a senior analyst and investor for nearly a decade.
- **BlueBay Asset Management** has made two developed market special situations hires, appointing **James Rous** as an **institutional portfolio manager** and **Giovanni Galvani** as an **analyst**.
- **Blue Horizon** has appointed **Manu Gupta** to its **board of directors**. Gupta's appointment followed other hires including a General Counsel, a new Partner, as well as two Directors to the investment team.
- **Candriam** has appointed **Anthony Macdonald** as **head of UK institutional business**.
- **Connection Capital** has appointed **Anas Afzal** as a **fund associate** in its **alternative funds team**, bringing the analyst from abrdn.
- **Credit Suisse** has **fired fund manager Lukas Haas and fixed income head Luc Mathys**, who managed the \$10bn (€8.8bn) range of **Greensill-linked funds**. Additionally, former head of asset management for Europe, the Middle East and Africa **Michel Degen**, will be **let go**. Also, **Eric Varvel**, who was in charge of the asset management division as the scandal broke out is **departing**. Until recently, he was still the chief executive of the firm's legal entity and chairman of the investment bank.
- **Eastspring Investments** has hired **Stuart Wilson** as its first **head of sustainability** to accelerate its work in meeting long-term sustainability goals.
- **Edmond de Rothschild Asset Management's Alain Krief** has **left** his position as **back-up manager on two** of the firm's **emerging markets funds**, after just over a year of running the strategies.
- **FCA executive director of transformation Megan Butler** is **leaving** the regulator next year. **Emily Shepperd** will **take over the FCA's transformation programme** alongside her role as executive director of authorisations.
- **Federated Hermes** has promoted **Vivek Bhutoria**, currently a senior analyst, to **co-portfolio manager** on the firm's **Global Emerging Markets Equity fund**, where he will work alongside lead portfolio manager Kunjal Gala.
- **Franklin Templeton** has appointed **Lee Hollingworth** as its first **head of UK retirement** to spearhead the asset manager's growth plans in the sector.
- **Hargreaves Lansdown** has hired Virgin Group chief financial officer (CFO) **Amy Stirling** to fill the void left by Philip Johnson's pending departure. Stirling, who has been part of Virgin's senior leadership team since September 2016, **will succeed Johnson as Hargreaves' CFO** next February.
- **Insight Investment** has appointed **Fabien Collado** as **ESG portfolio manager** and **Rhona Cormack** as **senior stewardship analyst**, both joining the firm's £232.5bn (€273bn) fixed income team.

- **Isio Pension Advisory** has promoted **Cadi Thomas** to **head of ESG research** and she will be driving the team's agenda for sustainable investing. **Andrew Singh** will meanwhile become **head of the real assets team**, covering a broad array of sub-asset classes including property, infrastructure and natural capital. In addition, **Tom Wilson** has been promoted to **head of credit research** covering both public and private credit markets.
- **Janus Henderson** expands its **ESG team** with **six hires**. This includes **Dan Raghoonundon**, who will become **ESG research lead**. In addition, **Charles Devereux**, who previously worked at Aviva Investors, and **Olivia Jones**, who joins from ESG sustainability and climate consultancy Kukuva, have started as **ESG research analysts**. Another Aviva Investors hire is **Jesse Verheijen**, who starts at Janus Henderson as an **ESG data analyst**. The company has also hired **Bhaskar Sastry** as **ESG content manager** from State Street Global Advisors, where he has worked since 2019 in a similar role. Lastly, **Blake Bennett** has been brought in as **governance and stewardship analyst** and will be based in Denver.
- **J O Hambro Capital Management** has named **Tom Hughes** as **head of marketing and communications, UK, Europe, and Asia**.
- **JP Morgan Asset Management** has created the new role of **global head of investment stewardship**, appointing **Yo Takatsuki** to the position.
- **J Safra Sarasin** has hired **Daniel Wild** as **chief sustainability officer**, the firm has announced. Daniel will officially join the Swiss bank in March and **replaces Jan Amrit Poser**.
- **Lazard Asset Management** has bolstered its sustainable investment capabilities with the appointment of **Koen Popleu** and **Monika Kumar** as **portfolio managers**.
- **Lombard Odier** has announced that **Jean-Pascal Porcherot** will become a **managing partner** of the business from 1 January 2022.
- **MacKay Shields** has hired **five investment professionals** from BMO GAM as it seeks to establish a new emerging market debt (EMD) capability out of London. **Philip Fielding** and **Valentina Chen** will join MacKay as **co-heads of EMD** on the **global credit team**, reporting to Eric Gold, senior portfolio manager and head of global credit. **Henry Stipp** will also join the team as a **portfolio manager** and **Gordana Ilic** and **Christopher Garcia** as **analysts**. They all join from **BMO GAM** where they had similar positions.
- **Man GLG** has hired **Yohann Terry** and **Jann Breitenmoser** to **manage thematic equity strategies**, the firm has announced. The duo most recently worked at Swiss group J. Safra Sarasin Asset Management.
- **Marlborough's Geoff Hitchin** is **retiring** after 34 years running the **Marlborough Global Bond fund**. Colleagues **Danny Fox** and **Niall McDermott** took over the running of the fund on 1 December.
- **MDOTM** has hired **Fredrik Werneman** as **senior vice president of business development**.
- **Mediolanum International Funds** has hired **Jeremy Humphries** for the newly created role of **head of quantitative investments**. Humphries, who was most recently with Davy Global Fund Management, will work in Mediolanum's Dublin office.
- **Mercer** has hired **Adam Lane** and **Jemma Beattie** to its **investment advisory team**, and **Alexa Shanks** has been brought in as **head of intermediary relations**. All three will report to Dan Melley, head of UK investments at Mercer.
- **Mirabaud** has appointed head of global equities **Anu Narula** as an **equity partner** of the group. Narula has been working at Mirabaud for nearly a decade and is a member of the firm's asset management executive committee.
- **Moody's ESG Solutions Group** has appointed **Julia Haake** as **managing director for market strategy**. In this newly-established role, Haake will be responsible for Moody's commercial sustainability and ESG strategy impact.
- **Neuberger Berman Portfolio Managers Russ Covode** and **Daniel Doyle** are planning to **leave** the firm next summer. They will depart on 30 June 2022, and will step off the \$1.5bn **Neuberger Berman High Income Bond fund** by that time.
- **Patrizia**, the German investment manager, has hired **Søren Zoffmann** as **head of nordics, capital markets**.
- **Robeco** has appointed **Ben Rowley** as **senior sales manager** in its **UK wholesale team**.
- **Royal London Asset Management** has appointed **Siobhan Clarke** as its **chief investment operations officer**. Clarke has more than 25 years' experience and joins from M&G Investments, where she worked as head of international operations.
- **Sanlam co-founder** and current **head of asset management Tom Carroll** is **leaving** the business to become **chief investment officer** of **Rathbones' unit trust arm**.

- **Sequoia Economic Infrastructure Income Fund Limited** has announced the appointments of **Timothy (Tim) Drayson** and **James Stewart** as **non-executive directors of the board**.
- **Swedbank Robur** has hired **Fredrik Stenkil** as a **portfolio manager** of the €3.69bn (SEK38.1bn) **Ny Teknik fund**.
- **The Institutional Investors Group on Climate Change (IIGCC)** has appointed **six new members to its board** following elections at its annual general meeting earlier this month. The new appointments are Federated Hermes head of stewardship **Bruce Duguid**, APG Asset Management managing director of global responsible investment and governance **Claudia Kruse**, Environment Agency Pension Fund chief investment officer **Graham Cook**, AustralianSuper listed ESG and stewardship manager **Kelly Christodoulou**, Amundi head of ESG research, engagement and voting **Caroline Le Meaux**, and BlackRock global head of investment stewardship **Sandy Boss**.
- **TwentyFour Asset Management's** long running **chief executive Mark Holman** is to **stand down** from the role in a **handover** to fellow founding partner **Ben Hayward**.
- **UBS Asset Management** has appointed **Lucy Thomas** as **head of sustainable investing**, which will see her leading the delivery of UBS AM's sustainability and impact strategy.
- **Velliv**, the Danish pension provider, has announced that **Thomas Kjærgaard**, **head of ESG**, is **leaving** the firm.
- **Waverton Investment Management** has hired a **trio of fund managers** from rivals as it embarks on the next stage of its development. It has hired **Simon Laing** from Investec as a **portfolio manager and director**, **Tom Saville** from Ruffer as a **portfolio manager**, and **Peter Grant** from Smith & Williamson as a **portfolio manager**.

The Team

Richard Valentine

Chairman



1 Cornhill | London, EC3V 3ND
tel: +44 (0) 7979 645520
rgv@valentinethomas.com

Basil Reid Thomas

Partner,
Investment Management &
Co-Head of ESG



1 Cornhill | London, EC3V 3ND
+44 (0) 7970 940397
brt@valentinethomas.com

David Harms

Partner,
Investment Management &
Co-Head of ESG



1 Cornhill | London, EC3V 3ND
+44 (0) 7973 924767
dharms@valentinethomas.com

Alex Diffey

Partner,
Head of Wealth
Management



1 Cornhill | London, EC3V 3ND
tel: +44 (0) 7939 227783
adiffey@valentinethomas.com

Celia Cortijo

Consultant, Investment
Management



1 Cornhill | London, EC3V 3ND
tel: +44 (0) 7930 443875
ccortijo@valentinethomas.com

Holly Carruthers

Asset Management
Analyst



1 Cornhill | London, EC3V 3ND
+44 (0) 7585 943540
hcarruthers@valentinethomas.com

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Valentine Thomas & Partners is a leading investment and wealth management executive search firm covering the EMEA markets.

