



VALENTINE THOMAS

— & PARTNERS —

People Moves | Investment Management EMEA

April 2022

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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.

- **Allfunds' Jörg Grossmann** has left his position as **global head of products and strategic alliance**.
- **AMG** has announced that **Julia Roording** has recently joined them as **managing director, Northern Europe distribution, the nordics and the Benelux regions**. Julia previously worked as regional director for Northern Europe, head of Nordics and Netherlands at Ninety One.
- **Aviva Investors** has appointed **Charlotte Jones** as **chief financial officer (CFO)** following the resignation in January of former CFO Jason Windsor. Charlotte joins Aviva from RSA Insurance, where she was CFO and interim chief executive of its UK and international business.
- **AXA Investment Managers** has made three appointments in its **corporate governance and stewardship team**. **Héloïse Courault** joins the company's Paris office as **senior corporate governance and stewardship analyst**. **Alexandre Prost** has also been appointed **senior corporate governance and stewardship analyst** but will be based in London. Also in London, **Constance Caillet** has been appointed a **corporate governance and stewardship analyst**.
- **Bantleon**, the asset manager, has hired **Frederik Bröker** as a **portfolio manager and securities trader for equities and derivatives**.
- **BMO Real Estate Investments (BREI)** has appointed **Matthew Howard** as **lead manager**. Matthew, who is fund manager of the RSA Shareholders Real Estate fund and deputy manager of the BMO Commercial Property Trust, will succeed Peter Lowe as lead manager of BREI.
- **BNP Paribas Asset Management** has appointed **Olivier Laplénie** as **head of quantitative portfolio management**, the firm has announced. Laplénie, who is taking on a newly created role, has worked at BNP Paribas for over a decade and was most recently head of the firm's fixed income quant unit.
- **BNY Mellon Investment Management's Newton** has appointed **Alex Khosla** as a **portfolio manager** on the firm's **global emerging markets and asian equities strategies**, within its **global opportunities team**. Khosla joined the firm from Aikya Investment Management, where he was an investment analyst working on global emerging markets.
- **Candriam** has appointed **Alexandra Russo** as **head of ESG**. She previously worked for Allianz Global Investors within thematic equity coverage, with a focus on sustainable and ESG Investing.
- **Church Commissioners for England** has hired **Paul Jaffe** as **real assets sustainability head**. Jaffe joins from British Land where he worked as a senior asset manager and sustainability lead for over six years.
- **Cliens Kapitalförvaltningen** has announced the **departure of CEO Erik Andersson**.
- **Credit Suisse Asset Management** has appointed **Andrew Jackson** as **head of fixed income** effective from June 2022, the firm has announced. Andrew most recently worked as head of fixed income at Federated Hermes, which he joined in 2017 as a fund manager.
- **DWS' Rick Smith** has announced plans to **retire** later this year. Rick has been at DWS for nearly 18 years as a portfolio manager and will step off the \$1.2bn DWS Short Duration and \$2.6bn DWS Enhanced Commodity Strategy funds.
- **Epworth Investment Management**, the UK manager focused on churches and charities, has appointed **Simon Woolnough** **Head of Business Development**.
- **General Atlantic** has announced the appointment of **Cornelia Gomez** as **global head of ESG**, responsible for overseeing the company's strategy to advance its ESG efforts internally and across its portfolio. In addition, General Atlantic's climate growth equity arm, **BeyondNetZero**, has appointed **Lance Uggla** as **chief executive officer**. He was most recently the chairman and CEO of analytics company IHS Markit, having founded Markit in 2003.
- **Goldman Sachs** has announced the appointment of **Sam Carter** as an **executive director**. Sam joins from ATLAS infrastructure where he was head of distribution.

- **HSBC Bank Pension Trust** has appointed **Emma Hunt** as **head of responsible investment**. Previously senior director for client services at Impax Asset Management, Emma has 25 years of experience in stewardship, ESG and sustainable investment.
- **Kingswood** has promoted UK chief executive **David Lawrence** to **CEO** of the group, **replacing Gary Wilder**.
- **Lansdowne Partners**, the London equity specialist, has appointed **Michael Godfrey** to launch a **new strategy**. The new **Lansdowne strategy** is expected to be a **long-only emerging markets-focused equity fund**. Godfrey was most recently at Marathon Asset Management, where he was manager of the firm's Global Emerging Markets fund.
- **Lazard Asset Management chief executive Ashish Bhutani** is **retiring** after nearly two decades with the group and will be **replaced by** chief financial officer **Evan Russo**. Ashish will continue to serve as **chairman of asset management** and as **vice-chairman of Lazard** until the end of the year.
- **Lombard Odier Investment Managers** has announced the appointment of **Ruben Lubowski** as the company's first ever **chief carbon and environmental markets strategist**. His most recent position was the Environmental Defense Fund's chief natural resource economist and associate vice president for climate and forests.
- **M&G's chief executive John Foley** is to **retire**. The company said Foley would remain in place until a successor is identified by Edward Braham, the recently appointed chair of the board.
- **Maitland**, the specialist fund administrator, has appointed **Jacolene Otto** as **head of fund services for Luxembourg**. Otto joined Maitland in 2017 and was previously a chartered accountant with KPMG.
- **Martin Currie** has hired two **investment analysts** to strengthen the research capability on its global long-term unconstrained team. London-based **Jackie Ciu** joins from JP Morgan Chase and in her new role at Martin Currie, research responsibilities will cover the **technology, media and telecoms, and financial sectors**. **Anna Shevkunova**, who is based in Edinburgh, has been appointed to cover the **healthcare sector**.
- **Newton Investment Management** has appointed **Alex Khosla** as a **portfolio manager** for their **global opportunities team**. Alex joins from Aikya Investment Management where he was an investment analyst.
- **Ninety One** has hired former programme director of the Institutional Investors Group on Climate Change (IIGCC) **Daisy Streatfeild** as **sustainability director**.
- **PFA**, the Danish pension provider, has announced that **Sasja Beslik** is **leaving** after only six months as **sustainability head to run Asia's first Article 9 fund**. Beslik will join **SDG Impact Japan**, one of the first sustainable finance specialist firms in the country, as its **chief investment officer and portfolio manager** of the **NextGen ESG Fund Japan**.
- **Quilter Cheviot** has hired **Jarek Pominkiewicz** and **Tom Gilbey** as **equity research analysts**. Jarek joins the investment manager from Jefferies, where he was an analyst. Meanwhile, Tom previously worked as an analyst at RWC Partners, now Redwheel. In addition to this, Quilter Cheviot has appointed **William McDonald, Patrick Good, and Tom O'Dea** to join its Dublin office. **McDonald** has been appointed as **investment manager** whilst **Good** and **O'Dea** as **financial planners**.
- **Rathbone Greenbank Investments** has made three appointments to its investment management team. **Christophe Borysiewicz** joins as an **investment director**, specialising in the management of portfolios for charities and trusts. **Jonathan Moon** also joins as an **investment director**, specialising in managing tailored investment portfolios with a focus on sustainability, impact and ESG considerations. **Stephanie Sotiriou** has been appointed **assistant investment manager**.
- **RSMR** has hired **Olga Baron** from Wellian Investment Solutions to support its investment team. Baron, who worked at Wellian for five years until it was merged into a new division of Hawksmoor Investment Management last month, will support RSMR's **research team**.
- **Sarasin & Partners** has promoted **Jerry Thomas** and **Phil Collins** to **dual CIO to replace Guy Monson**, who steps back from the role to take a 'greater focus' on **client interactions**.
- **Schroders Capital Real Estate** has appointed **Rebecca Gates** its **head of UK asset management**. Rebecca joins the firm from LaSalle Investment Management, an independent subsidiary of global real estate company Jones Lang LaSalle, where she held the same role.
- **SEI's founder, Alfred P West**, is **stepping down** as **chief executive** after 50 years. Alfred will become **executive chair** of the US asset manager, handing the CEO role to executive vice president and chief information officer **Ryan Hicke**.
- **Stonepeak**, the alternative investment group, has hired **Daniel Wong** as **senior managing director, head of Europe**. Previously, Wong was global co-head of Macquarie Capital, the principal financing and investing arm of Macquarie Group.

- **Swedbank Robur** has changed the management of its SEK 2.5bn (€241m) **Swedbank Robur Humanfond**, with **Carl-Fredrik Lorenius stepping back** from the strategy. **Linnea Zanetti** was appointed **lead portfolio manager** on 17 March, with head of quant portfolio management **David Stenlund** and portfolio manager and strategist **Johan Eriksson** now assigned as **co-managers**.
- **Tabula Investment Management** has hired **Woon Kim** from WisdomTree Investments Europe, to boost **business development** in the **UK**. At WisdomTree, he was responsible for UK client coverage with a focus on asset managers, private banks and wealth managers.
- **Tilney Smith & Williamson's CEO, James Gordon**, has announced his plans to **retire**. **Neil Coxhead**, who joins from Waystone will be his **replacement**.
- **Tritax Group**, the real estate investment company, has appointed **Alan Somerville** as **director of ESG**. Before joining Tritax, Alan headed Governex Group, providing consultancy on ESG strategy development.
- **T. Rowe Price** has appointed **Kimberly Johnson** as the firm's new **chief operating officer**, effective the 29th of April.
- **UBS** has hired private equity veteran **Michelle Shi** in a move to expand its alternatives business in Asia-Pacific. Shi joins as the **chief investment officer** for the firm's **global investment management alternative solutions in Asia-Pacific** from GE Asset Management, where she was head of Asia private equity.
- **Vortex Energy**, the renewables investment manager, has appointed **Ana Peris Caminero** as **chief operating officer** and **member of the Investment Committee**. Ana was most recently at Spain's Naturgy where she oversaw the company's entry into the US through the acquisition of solar and storage development platforms.
- **Willis Towers Watson (WTW)** has appointed **Joseph Noss** as **Senior Director of the Finance Sector in its Climate and Resilience Hub**. Joseph joins WTW from the G20 Financial Stability Board (FSB) in Basel, where he led on climate financial regulation for the banking, investment and insurance sectors.



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

