



VALENTINE THOMAS

— & PARTNERS —

People Moves | Investment Management EMEA

July 2023

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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.

- **Aon** has named **Maria Johannessen** as **UK Head of Investment**, effective immediately.
- **AJ Bell** founder Andy Bell has nominated **Les Platts** as **Non-Executive Director** to represent his interests to the board of the group.
- **Aviva Investors** has appointed **Jill Barber** as the firm's **Global Head of Distribution**, replacing **Louise Kay** who is due to **retire** at the end of this year.
- **Baillie Gifford** has appointed **David Barron**, ex-CEO of Miton Group, to their European Growth Trust board as a **Non-Executive Director**; from October 1st.
- **Canada Life Asset Management** has appointed **Paul Pugh** as **Head of Strategic Alliances** within its distribution team.
- **Carlyle** has hired Franklin Templeton's **Shane Clifford** as **Head of Private Wealth Strategy**.
- **CG Asset Management** has taken the next step in its succession planning and promoted **Chris Clothier** to **Co-Chief Investment Officer**.
- **Coutts'** Chief Executive **Peter Flavel** has **stepped down** with immediate effect.
- **Fulcrum Asset Management** has expanded its investment team with two senior hires. **Helen Roughsedge** will join as **Investment Director** from Legal & General Investment Management, and **Stephen Hull** has taken on the role of **Portfolio Manager** in Fulcrum's macro strategies, with a focus on fixed income and currencies. **Nabeel Abdoula**, Partner and Deputy CIO, is set to **leave** the company next summer to pursue a new opportunity.
- **Hamilton Lane** has appointed **Andrew Schardt** as **Vice-Chair**, and **Jeffrey Armbrister** as **Chief Financial Officer**; replacing existing CFO **Atul Varma**, who is **leaving** the firm to pursue other interests. Finally, **Ken Binick** will join the firm as **Managing Director** and **Head of Execution** on the direct equity team.
- **Hargreaves Lansdown** has appointed **Michael Morley** to join the board as an **Independent Non-Executive Director**. In addition, their Chair, **Deanna Oppenheimer**, is expected to **step down** from her role.
- **Hawksmoor Investment Management** has hired **Catherine Routh** as its **Chief Operating Officer**, as it seeks to expand the business through acquisitions of firms and investment teams.
- **Invesco** has hired equity manager **Michael Oliveros** from M&G. He joins as a **Portfolio Manager** on Invesco's Global and European Small Cap funds.
- **Janus Henderson** has appointed **Marc Pinto** as **Head of Americas Equities**. Additionally, **Lucas Klein** will join in September as **Head of EMEA And Asia Pacific Equities** from Fidelity International. Furthermore, **Julian McManus** has also been appointed **Portfolio Manager** on the group's Global Alpha Equity team.
- **Magellan Financial Group** have appointed **Andrew Formica**, the Ex-CEO of Jupiter Asset Management, as a **Non-Executive Director**.
- **M&G Investments** has appointed Credit Suisse' **Michael van der Meer** as **Head of Sustainability**. In addition, pensions veteran **Clive Bolton** has been hired as **Chief Executive** of its life insurance business. Furthermore, **M&G Wealth** has named former Brooks Macdonald Chief **Caroline Connellan** as **CEO**.
- **Morgan Stanley Investment Management** announced that long-serving **Portfolio Manager Christian Roth** will be **replaced** by **Vishal Khanduja** on the \$760m Morgan Stanley Global Fixed Income Opportunities fund. The changes will be effective 1 December.
- **Morningstar** has promoted Global CIO **Dan Kemp** to **Chief Research and Investment Officer**.
- **Natixis Investment Managers** has appointed **Nathalie Bricker** as **Global Head of Finance and Strategy**.
- **NatWest CEO Alison Rose** has **resigned**.
- **Nomura Asset Management** has appointed **Magashlin Chetty** as an **Executive Director** and **Assistant Portfolio Manager**.
- **Nomura Private Capital** has hired **Steve Kavulich** from BlackRock as **Head of Opportunistic Private Credit**.
- **Newton Investment Management** has hired Pictet fund manager **Ella Hoxha** as new **Head of Fixed Income**, with **Paul Brain** moving to the newly created role as **Deputy Chief Investment Officer**.
- **Redington's Head of Manager Research, Nick Samuels**, has **left** the investment consultancy.

- **Redwheel's** Fund Manager **Louise Keeling** has **retired** and has **handed over** her responsibilities to co-manager **Benjamin Hall**.
- **Ruffer's** Chief Financial Officer, **Michael Gower** has **left** the firm.
- **Sixth Street Partners** has appointed Goldman Sachs Asset & Wealth Management's Chief Investment Officer, **Julian Salisbury**, as **Partner** and **Co-Chief Investment Officer**.
- **Triple Point** has appointed **Neil Ebdon** as the investment manager's **Chief Risk Officer**.



The Team

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

