

# EFFAS SUMMER SCHOOL PROGRAMME\* 2023

## EUROPE: STRETCHING CAPITAL MARKETS FOR GROWTH

**JULY 6, 2023**

**9:00-9:30 Registration**

**10:00-10:30 Key Note**

**The macro environment and ESG**

**Mr. Fritz Mostboeck**, CEFA®, CESGA®,  
Head of Group Research/ Erste Group, Deputy  
Chairman EFFAS, Chairman OVFA Austria.

**10:30-11:00 Key Note**

**The European Capital Markets Union**

**Why are equity capital markets so important for  
Europe?**

**Mr. Thorsten Müller**, Managing partner at Lighthouse  
Corporate Finance GmbH. Board Member of EFFAS,  
Chair of the Board of DVFA.

**The EU listing act & additional topics.**

**Dr. Norbert Kuhn**, Deputy Head Capital Markets at  
Deutsches Aktieninstitut, Germany.

**11:00-12:15 Key Note and Panel**

**Discussion**

**The importance of the insurance sector in  
European equity and credit markets**

**Dr. Carsten Zielke**, owner of Zielke Research Consult  
GmbH.

**Europe's the need for the Return of the  
insurance industry as an equity investor**

**(tbc) Mapfre**

**Dr. Carsten Zielke**, owner of Zielke Research Consult  
GmbH and member of the CFR.

**Ms. Isabel Castelo Branco**, BPI Vida e Pensões,  
Portugal.

**Mr. Thorsten Müller (moderator)**, Managing partner at  
Lighthouse Corporate Finance GmbH. Board Member  
of EFFAS, Chair of DVFA, Germany.

**12:15-13:45 Lunch Break**

**13:45-14:15 Key Note**

**ESMA's Role in fostering the European Capital  
Markets Union**

**Ms. Isabelle Grauer-Gaynor**, Head of Corporate Finance  
and Reporting, ESMA.

**14:15-15:00 Panel Discussion**

**The European Capital Markets Union: Where do  
we go?**

**Ms. Isabelle Grauer-Gaynor**, Head of Corporate  
Finance and Reporting, ESMA.

**Dr. Norbert Kuhn**, Deputy Head Capital Markets at  
Deutsches Aktieninstitut, Germany.

**Dr. René Nicolodi**, Head of Equities & Asset Mgt. at  
Swisscanto Invest. Board member at the Swiss SSF.

**Mr. Eric Van Der Plaats**, DGFisma, Senior Expert of the  
European Commission.

**Mr. Thorsten Müller**, Managing partner at Lighthouse  
Corporate Finance GmbH. Board Member of EFFAS,  
Chair of DVFA, Germany.

**15:00-15:20 Coffee Break**

**15:20-17:00 Panel Discussion**

**Asset Management, after thirty years of declining  
rates, what are the implications of the new interest  
environment?**

**(tbc), Fidelity Investments**

**(tbc), CaixaBank Asset Management**

**(tbc) Amundi Asset Management**

**(tbc) Blackrock**

**João Pratas**, APFIPP President

**CIO round table: Where do we go from here?**

**Mr. Frank Klein**, Managing Director at DWS, DVFA Board  
Member, Germany.

**Mr. Jorge Sousa Teixeira**, CIO BPI Asset Management.  
**(tbc) CIO,**

**Dr. Manuel Puerta (moderator)**, Board Member at BPI  
Asset Mgt., Board Member of EFFAS, Chairman of APAF,  
Portugal.

**17:00 Closing remarks of day one.**

## GALA DINNER

**Invited Guest:** Mr. LUIS LAGINHA DE SOUSA, Chairman of the Portuguese Securities Market Commission  
(CNMV)



**EFFAS**

The European Federation  
of Financial Analysts Societies

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## EUROPE: STRETCHING CAPITAL MARKETS FOR GROWTH

**JULY 7, 2023**

**09:00-10:15 Key Note & Panel**

### Discussion

**The future development of corporate reporting: GRI/ISSB – EFRAG CSRD.**

**Mr. Eric Van Der Plaats**, DGFisma, Senior Expert of the European Commission.

**Mr. Hans Buysse**, EFRAG Administrative Board President, Board Member of EFFAS, Chair of ABAF, Belgium.

**ESG Round table: How do corporates handle the challenge?**

(tbc), Solveig

(tbc) Austrian SME

(tbc) CESGA holder

**Mr. João Duque**, ISEG Dean, Portugal

**10:15-11:00 Key Note and Panel**

### Discussion

**SME equity and credit markets in Europe**

**Mr. Stefan Maxian**, Director at Raiffeisen Bank International's Equity Capital Markets team, Austria.

**Mr. Angelo Dipasquale**, Co-Head of Fixed Income Desk at Equita.

**Mr. Abel Ferreira**, member of the Board of Directors and Executive Director of AEM (Association of Listed Companies), Portugal.

**Ms. Barbara Cohen**, Executive Director at Scope Ratings, Germany.

**Mr. Thorsten Müller**, Managing partner at Lighthouse Corporate Finance GmbH. Board Member of EFFAS, Chair of the Board of DVFA.

**11:00-11:20 Coffee Break**

**11:20-12:20 Key Note and Panel**

### Discussion

**SME Best Practice**

**The Italian PIR Programme – small and mid caps.**

**Mr. Davide Grignani**, Chair of the AIAF, Italy.

**The Nordic experience - nano and micro caps.**

**Mr. Markus Neuding**, Executive Vice President, Spotlight Group AB, Sweden.

**The Spanish Research Project**

**Mr. Alfredo Echevarría**, Lighthouse-IEA, Spain.

**12:20-13:00 Panel Discussion**

**How to develop European SME Capital Markets**

**Mr. Thorsten Müller**, Managing partner at Lighthouse Corporate Finance GmbH. Board Member of EFFAS, Chair of the Board of the German Association of Financial Analysts (DVFA), Germany.

**Mr. Hans Buysse**, EFRAG Administrative Board President, Board Member of EFFAS, Chair of the Board of the Belgian Association of Financial Analysts (ABAF), Belgium.

**Mr. Markus Neuding**, Executive Vice President, Spotlight Group AG, Sweden.

**(tbc) Italian panellist / Portuguese panellist.**

**13:00 Closing remarks**