

**Date:** September 8

**Location:** Fitch Solutions, 30 North Colonnade, Canary Wharf, London

[ATTENDEES](#) /

[PHOTOS](#)

## **SCHEDULE**

3:30PM - 3:55PM **Registration/Networking**

3:55PM - 6:10PM **Program**

Opening remarks - **FISD**

### **Member Briefing**

Ian Rothery, **FitchSolutions**, Managing Director Strategic Partnerships

### **Member Briefing**

Jack Hamilton, **NasdaqOMX**, Sales Director

## **Panel 1 - The Index Forum - Benchmarking and Performance Evaluation**

This panel session will examine the basics of benchmarking and performance evaluation in today's market. Our panelists will address such issues as the standards for creating benchmarks, the role of indexes in performance evaluation, the different types of benchmarks and the tasks involved in selecting a specific benchmark among a number of options. The discussion will also include reference to the rise in benchmarking for an increasing number of portfolios and the specific market data aspects of performance evaluation related to data integrity.

### *Moderator:*

Steven Goldin, **Parala Capital**,  
Managing Partner

### *Panelists:*

Gareth Parker, **Russell Indexes**,  
Director, Index Research, Design & Development (EMEA)  
Steve Cheng, **RIMES Technologies**,

Senior VP, Global Head of Data Management

Andrew Lewin, **Citi**,

Market Data Analyst

Alan Wilcock, **BNY Mellon**,

Managing Director

Andrew Devlin, **Credit-Suisse**,

Director

### Update briefing - Legal Entity Initiative

Julia Sutton **RBC** Global Head, Customer Accounts Operations

### Member Briefing

Carsten Dirks, **Interactive Data**, Global Head of Wealth Management

### Panel 2 - Cost - still **massively important**

Cost is still high on most consumer firm's agendas - in terms of '*Cost Reduction*'. This includes cutting services, but how and which ones? It also means negotiating better discounts but again how? Finally it is also about finding lower cost alternatives, but is this even possible in some monopoly/duopoly scenarios? Moving beyond reduction we will also enquire into '*Cost Management*'

- the process and procedures to ensure a customer firm really knows what it has purchased in detail, this includes processes like Inventory Management and Audit (internal and external) and where they fit. This panel will explore these issues and other related topics from a very specific market data perspective - including both consumer and vendor points of view.

*Moderator:*

Janelle Veasey, **3d innovations**, Director Product Management

Panelists:

Ian Williams, **Credit Suisse**,

Head of Market Data Business Management

John Chappell, **Goldman Sachs**,

Executive Director, EMEA Head of Market Data Services

Steve Allen, **Citigroup**,

EMEA Head - Market Data Strategy

Russell Enright, **Sungard**,

Sales Director - Marketmap

Ben Collins, **Morningstar**,  
Sales & Marketing Director, Real-Time Data

6:10PM - 7:30PM **Networking Reception**