

PROGRAMM

MONTAG, 10. JANUAR



CET 8:30 - 9:00

Good Morning Markets

Christophe Tadié • Head of Corporate Investment Banking at ODDO BHF
Matthias Desmarais • Deputy Head of Equities at ODDO BHF
Sylvain Goyon, CFA • Head Equity Strategy at ODDO BHF
Agathe Schittly • Global Chief Marketing Officer, Member of the General Management Committee at ODDO BHF



CET 9:00 - 9:30

The Lead with Laurent Mignon by Natixis CIB

Laurent Mignon • Chairman of the Groupe BPCE Management Board and CEO
Philippe Oddo • General Partner and CEO of ODDO BHF



CET 9:30 - 10:00

Focus on: Covid-19 WIE GEHT ES WEITER?

Arnaud Fontanet • Epidemiologist, French Scientific Council member
Didier Pittet • Head of Infection Prevention and Control at HUG and Faculty of Medicine of Geneva, Director of the WHO Collaborating Centre for patient safety
Martial Descoutures • Senior Equity Analyst Pharma & Biotech at ODDO BHF



CET 10:00 - 10:30

The Lead with Catherine MacGregor

Catherine MacGregor • CEO of Engie
Louis Boujard • Equity Analyst Utilities / Renewable at ODDO BHF



CET 10:30 - 11:00

Focus on: Die Zukunft der Banken

Alessandro Foti • CEO and General Manager of FinecoBank
Jean-Marc Stenger • CEO of Societe Generale - Forge
Didier Valet • President of Xanthe Conseil
Miriam Wohlfarth • Founder of Banxware
Alex Koagne • Thematic Equity Portfolio Manager, Financials at ODDO BHF



CET 11:00 - 11:30

The Lead with Ola Källenius

Ola Källenius • Chairman of the Board of Management of Daimler AG
Michael Foundoukidis • Senior Analyst Autos & Auto Parts at ODDO BHF



CET 11:30 - 11:45

Talk with Gilles Babinet

Gilles Babinet • Co-president of the French National Council on Digital Affairs, Digital advisor to the Montaigne Institute, Writer
Stephane Houry • Equity Analyst, Head of Sector Equity Research at ODDO BHF



CET 11:45 - 12:15

The Lead with Sigmar Gabriel

Sigmar Gabriel • Former Vice Chancellor, Former Minister for Foreign Affairs, German Chairman of the Atlantik-Brücke e.V.
Philippe Oddo • General Partner and CEO of ODDO BHF
Werner Taiber • Chairman of the Supervisory Board of ODDO BHF AG



CET 12:15 - 12:45

The Lead with Patrick Pouyanné

Patrick Pouyanné • Chairman & CEO of TotalEnergies
Ahmed Ben Salem • Oil & Gas Equity Analyst at ODDO BHF



CET 12:45 - 13:30

2022 Investment Brief

Bruno Cavalier • Chief Economist at ODDO BHF
Laurent Denize • Global CIO at ODDO BHF Asset Management



CET 13:30 - 14:00

The Lead with Jean-Charles Decaux

Jean-Charles Decaux • Co-CEO of JCDecaux SA
Jérôme Bodin • Equity Analyst Media at ODDO BHF



CET 14:00 - 14:30

The Lead with Peter Altmaier

Peter Altmaier • Former German Federal Minister for Economic Affairs and Energy
Philippe Oddo • General Partner and CEO of ODDO BHF
Werner Taiber • Chairman of the Supervisory Board of ODDO BHF AG



CET 14:30 - 15:00

Focus on by Natixis CIB: Klimawandel

KLIMAZIEL MAX. +2°C: WAS BRAUCHT ES DAZU?

Nicolas Namias • Chief Executive Officer of Natixis
Fabienne Lecorvaisier • Executive Vice President at Air Liquide
Mathias Burghardt • Member of the Executive Committee and Head of Ardian Infrastructure Paris
Martina Macpherson • Head of ESG Strategy at ODDO BHF



CET 15:00 - 15:30

The Lead with Dr. Markus Söder

Dr. Markus Söder • Bavarian Prime Minister and Chairman of the CSU
Philippe Oddo • General Partner and CEO of ODDO BHF
Werner Taiber • Chairman of the Supervisory Board of ODDO BHF AG



CET 15:30 - 16:00

The Lead with Thomas Buberl

Thomas Buberl • CEO of Axa
Benoit Valleaux • Insurance Equity Analyst at ODDO BHF



CET 16:00 - 16:30

Focus on: Künstliche Intelligenz

WERDEN DAMIT DIE WEICHEN NEU GESTELLT?

Aurélie Jean • Computational scientist, CEO and founder of In Silico Veritas, and CAIO and co-founder of DPEEX
Jeremy Harroch • Founder & CEO of Quantemetry
Dr. Luc Julia • Co-creator of Siri, directed Siri at Apple and currently the Chief Scientific Officer for Renault Group
Antoine Blondeau • Co-founder and Managing Partner of Alpha Intelligence Capital (AIC)
Brice Prunas • Global Equity Portfolio Manager at ODDO BHF



CET 16:30 - 17:00

The Lead with Clement Beaune

Clement Beaune • Minister of State for European Affairs, attached to the Minister for Europe and Foreign Affairs



CET 17:00 - 17:15

Talk with Changpeng Zhao

Changpeng Zhao • Founder and CEO of Binance
Alexis Le Portz • Chief Innovation Officer at ODDO BHF



CET 17:15 - 17:30

The Closing Bell

Nathalie de Medina • Senior Sales Trader UK at ODDO BHF
Michael Vermehren • Head of Sales Iberia at ODDO BHF
Sylvain Tessier • Deputy Head of Equities, Head of ECM & Corporate Broking at ODDO BHF

PROGRAMM

DIENSTAG, 11. JANUAR



CET 8:30 - 9:00

Good Morning Markets

Matthias Desmarais • Deputy Head of Equities at ODDO BHF
Stephane Hourri • Head of Sector Research at ODDO BHF
Michael B. Schäfer • Senior Analyst Chemicals at ODDO BHF
Daniel Wendorff • Deputy Head of Research Germany Healthcare & Life Sciences at ODDO BHF



CET 9:00 - 9:30

The Lead with Stéphane Bancel

Stéphane Bancel • CEO of Moderna
Martial Descoutures • Senior Equity Analyst Pharma & Biotech at ODDO BHF



CET 9:30 - 10:30

Focus on: CHINA ANLAGEPERSPEKTIVEN FÜR 2022

Dominique Moïsi • Special Advisor for Geopolitics to Institut Montaigne
Ken Wong • Director, Client Portfolio Manager China Equities, Eastspring
Yan Lan • Vice Chairman of Investment Banking at Lazard,
Chairman and CEO of Greater China
Valérie Niquet • Head, Asia Program, Foundation for Strategic Research
Senior Research Fellow, Japan Institute of International Affairs
Dr. Axel Schweitzer • CEO of ALBA Group
Martin Fechtner, CFA • Multi-Asset Portfolio Manager, Emerging Markets at ODDO BHF



CET 10:30 - 11:00

The Lead with Angela Titzrath

Angela Titzrath • CEO of Hamburger Hafen und Logistik AG (HHLA)
Matthias Desmarais • Deputy Head of Equities at ODDO BHF



CET 11:00 - 11:30

Focus on: Die Zukunft der Nahrungsmittelindustrie WIE DIE LEBENSMITTELREVOLUTION UNSERE TÄGLICHE ERNÄHRUNG VERÄNDERT

Matthieu Vincent • Partner at DigitalFoodLab
Guillaume Fourdinier • Co-founder and CEO of Agricoool
Clément Bonhomme • Co-founder & co-CEO at Foodles
Anastasia Hofmann • Co-founder and co-CEO of KITRO
Clément Maclou • Senior Thematic Equity Portfolio Manager at ODDO BHF



CET 11:30 - 12:00

The Lead with Ben Smith

Ben Smith • CEO of Air France-KLM
Yan Derocles • Aerospace & Airlines Equity Analyst at ODDO BHF



CET 12:00 - 12:30

The Lead with Miki Yokoyama

Miki Yokoyama • Venture Partner at Pirate Impact
Léa Miomandre • ESG Analyst at ODDO BHF



CET 12:30 - 13:15

Lunch with ODDO BHF

Christophe-Raphaël Ganet • Head of Midcap Research at ODDO BHF
Jérémy Garnier • Head of NextCap Research at ODDO BHF
Pierre Bresnu • Market Data Analyst at ODDO BHF
Carole Braudeau • Head of Fixed Income Research at ODDO BHF
Yan Derocles • Aerospace & Airlines Equity Analyst at ODDO BHF
Emira Sagaama • Sustainability Research Senior ESG Analyst at ODDO BHF
Michael Foundoukidis • Senior Analyst Autos & Auto Parts at ODDO BHF
Alain William • Metals & Mining Senior Equity Analyst at ODDO BHF



CET 13:15 - 13:30

Talk with Yves Daccord

Yves Daccord • Executive chairman of the Edgelands Institute, former DG of the ICRC (international committee of the Red Cross)



CET 13:30 - 14:00

The Lead with Prof. Patrick Aebischer

Prof. Patrick Aebischer • President Emeritus of EPFL
Thierry Lombard • Member of the Supervisory Board ODDO BHF and Vice Chairman of the Board of Directors ODDO BHF



CET 14:00 - 14:30

Focus on: Europa

EIN NEW DEAL FÜR 2022?

Paul Maurice • Research Fellow at the Study Committee on Franco-German Relations (Cerfa) at the French Institute of International Relations
Maria Demertzis • Deputy Director at Institut Bruegel
Prof. Marina Henke • Professor of International Relations; Director at Centre for International Security
Bruno Cavalier • Chief Economist at ODDO BHF



CET 14:30 - 14:45

Talk with Amir Banifatemi

Amir Banifatemi • Chief Innovation & Growth Officer at XPRIZE
Benoit Claveranne • Chief Transformation & Development Officer at ODDO BHF



CET 14:45 - 15:00

Talk with Julien Blanchard

Julien Blanchard • CEO at Hoffmann Green Cement Technologies & Argilus
Sylvain Tessier • Deputy Head of Equities, Head of ECM & Corporate Broking at ODDO BHF



CET 15:00 - 15:30

Focus on: US-Außenpolitik und Wirtschaft

WELCHE WICHTIGEN ENTSCHEIDUNGEN FALLEN IN 2022?

Jeremy Ghez • Associate Professor of Economics & International Affairs at HEC Paris
Alexandra de Hoop Scheffer • Director of Research, Director of the Paris Office, German Marshall Fund of the United States
Thomas Mucha • Managing Director and Geopolitical Strategist at Wellington Management
Hani Kablawi • Chairman of International at BNY Mellon
Werner Taiber • Chairman of the Supervisory Board of ODDO BHF AG



CET 15:30 - 16:00

Focus on by BBVA: Klimawandel

Luisa Gomez Bravo • Global Head of Corporate and Investment Banking at BBVA
Javier Rodríguez Soler • Global Head of Sustainability at BBVA
Luis Cabra • Executive Managing Director of Energy Transition, Sustainability, and Technology; and Deputy CEO at Repsol.
Jean-Baptiste Roupheal • ESG Analyst, Head of Sustainability Research at ODDO BHF



CET 16:00 - 16:45

The Lead with Al Gore

Al Gore • Former Vice President of the United States of America, Chairman of The Climate Reality Project, 2007 Nobel Peace Prize
Philippe Oddo • General Partner and CEO of ODDO BHF
Thierry Lombard • Member of the Supervisory Board ODDO BHF and Vice Chairman of the Board of Directors ODDO BHF



CET 16:45 - 17:15

The Lead with Sébastien Bazin

Sébastien Bazin • Chairman and CEO of Accor
Johanna Jourdain • Hotels, Leisure & Support services Equity Analyst at ODDO BHF



CET 17:15 - 17:30

The Closing Bell

Kim Last • Head of German Equity Market New York Corporation at ODDO BHF
Evelyne Halkema Groll • Senior Sales Germany at ODDO BHF
Philippe Oddo • General Partner and CEO of ODDO BHF

IN PARTNERSHIP WITH

