

## PROGRAMME

LUNDI 10 JANVIER

*Good Morning*  
**MARKETS** 8H30 - 9H

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

THE  
LEAD  
with  
by NATIXIS  
Investment & Securities Business

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

FOCUS  
ON

CET 9:30 - 10:00

### *Focus on : Covid-19*

QUELLES CONSÉQUENCES POUR LA CROISSANCE ?

**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

THE  
LEAD  
with

CET 10:00 - 10:30

### *The Lead with Catherine MacGregor*

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

FOCUS  
ON

CET 10:30 - 11:00

### *Focus on : Future de la Finance*

**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

THE  
LEAD  
with

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

TALK  
with

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 Hourri • Equity Analyst, Head of Sector Equity Research at ODDO BHF

THE  
LEAD  
with

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 : Changement Climatique* QUELS SCÉNARIOS POUR RESTER SOUS LES 2 DEGRÉS ?

**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 : Intelligence Artificielle :* QUELLES PROMESSES POUR DEMAIN ?

**Aurélié 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

# PROGRAMME

## MARDI 11 JANVIER

*Good Morning*  
**MARKETS** 8H30 - 9H

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

THE  
LEAD  
*with*

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

FOCUS  
ON

CET 9:30 - 10:30

### *Focus on : Chine*

QUELLES ANTICIPATIONS POUR 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

THE  
LEAD  
*with*

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

FOCUS  
ON

CET 11:00 - 11:30

### *Focus on : Futur de l'alimentation*

QUELLE RÉVOLUTION ALIMENTAIRE DANS NOS ASSIETTES ?

**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

THE  
LEAD  
*with*

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

THE  
LEAD  
*with*

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 : Europe*

QUEL NOUVEL ÉQUILIBRE POLITIQUE EN 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 : Politique économique et diplomatie américaine*

QUELLES PRIORITÉS EN 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 : Changement Climatique*

**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

