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QTR 1
2023

QUARTERLY

INDUSTRY NEWSLETTER



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B&K QUARTERLY NEWSLETTER QTR 1,2023

QTR 1 2023

Welcome to a new quarter at B&K Consulting!

As APAC must adapt to the new realities of a larger global macro environment and market volatility, it is safe to say that the 40 years of steady growth and inflation are now behind us. Yet the region has proved remarkably resilient.

Businesses are now looking for ways to navigate growth in turbulent times. New digital tools such as Artificial intelligence (AI) and automation have been implemented in the recruitment process, and soft skills continue to be essential.

These last three months, the B&K family have attended some exciting industry events and celebrated some critical milestones for the business.

We hope you enjoy reading our newsletter!

All the best, John & Adrian.

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Prominent people movements, including appointments and departures within wealth management.

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We are always keeping up with the industry.
Check out what we've been up to this quarter.

*Disclaimer: Information from this newsletter came from multiple reputable online news sources including The Financial Standard, The Australian Financial Review, Industry Moves and Australian Securities & Investments Commission to name a few. Each bullet point contains a link to the source article.

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CLOSING THE GAP: PERSPECTIVES ON GENDER-PARITY IN FINANCIAL SERVICES

WITH CAMILLE SCHMIDT, Principal Analyst at APRA.

Men still outnumber women in the financial industry, particularly in the upper levels of financial-services companies. (Statistics show that about 46% of employees in the finance sector are women; however, only 15% occupy executive roles.)

Masculine dominant culture in the finance industry? Confidence gap? Lack of support and sponsorship? Inability to balance family and work? It is challenging to name a single reason for the gap.

The financial services industry has made some progress in closing the gender and race gaps, but there is still much work to be done.

We interviewed Camille Schmidt, who has been in financial services for over 13 years and works at APRA, the financial services regulator. This was a great opportunity to tap into Camille's perspective on the gender-parity gap in finance and discuss actions that financial services companies can take to advance gender diversity.



Camille, can you please introduce yourself?

"Yes, sure. My name is Camille Schmidt, and I am currently employed by APRA, Financial Services Regulator, as Principal Analyst in the Superannuation Division."

Could you give us a background on your experience in the financial services industry?

"Absolutely! So, I have been working in Financial Services for over 13 years and have undertaken industry- and academic-focused roles.

Before working for APRA, I previously worked at SuperRatings, a Superannuation Research House, as a Market Insights Manager for almost six years.

Before this, I was doing academic research fund on equity fund Investment Performance at the Centre for International Finance and Regulation and through a PhD Research program involving internships at Russell Investments and Mercer."

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CLOSING THE GAP: PERSPECTIVES ON GENDER-PARITY IN FINANCIAL SERVICES CONTINUED



Do you find there are some barriers that women face in financial services? Have you personally faced some obstacles?

"The two most common barriers relate to **pay** and **career advancement**. The gender pay gap is higher in financial services; women hold less than 30% of all senior roles.

We have seen improvement over time; however, more progress is still needed in this space. The pay gap is typically due to women taking career breaks for parental leave and other caring responsibilities.

I have been fortunate to have worked in roles where the companies are very conscious of the issues facing women, having solid diversity policies and transparency, which has supported equal pay for equal positions."

What can be done to encourage more women to choose a career in finance?

"Encouraging more women to pursue a career in finance starts in high school. Back then, I needed a better understanding of the different types of finance roles that were out there in high school. I initially studied marketing and management through a Bachelor of Business at University, and I quickly discovered finance and never looked back.

So, raising awareness towards the end of high school is one avenue when students decide on the types of courses they go into.

Then, once students leave university, graduate days are organised, and the university often brings in key organisations in the industry. Hence, these companies must emphasise the opportunities for women and how they're supporting them at these events."

Is it essential to have some female role models in the financial world? Were there any who helped you in your journey?

"It is imperative to have female role models in the financial world as it shows young women that there is a future in finance for them and inspires them to consider a career in this field.

There are so many women in this field who have inspired me throughout my career and for different reasons as well.

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CLOSING THE GAP: PERSPECTIVES ON GENDER-PARITY IN FINANCIAL SERVICES CONTINUED



I find **Shemara Wikramanayake**, CEO of Macquarie Group, inspiring for ascending to that role at one of Australia's largest global financial institutions. I also think about how she has led Macquarie to be involved in climate related projects. With over $65 billion committed to green projects since 2010, I think has been one of Shemara's biggest achievements.

While I was at Russell Investments, J**odie Hampshire**, Head of APAC for Russell Investment, led with purpose and clarity. She is a very warm individual, focused on well-being and sharing her journey, supporting others in that space."

"I find Shemara Wikramanayake, CEO of Macquarie Group, really inspiring."

How can organisations help change the culture and gender bias?

"It starts from the top down regarding the attitude of senior leaders and the company policies in place. Ensuring there aren't biases in recruitment & hiring practices, pay, and other benefits is crucial to adopting and imbedding global best practices."

Please share with us a couple of pieces of advice you would give other women in the finance field.

"**Join organisations** such as Women in Super to network with other women in financial services and see what other groups are available to join within your organisation to support diversity and inclusion; for example, APRA has the ASPIRE network.

Be bold and ask your employer or prospective employers how they address gender-related pay gaps and specify the desired pay level you want when applying for roles. **Research online** to see whether you may be underestimating the market rate, as women tend to ask for less, further contributing to the gender pay gap."

If You Have Any Questions, Feel Free to Reach Out.

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MARKET RECAP

Announced January

- **The Financial Services Council (FSC)** introduces enforceable standard, the minimum level of service that consumers should expect from their super fund when making a life insurance claim. more>
- **Macquarie Asset Management, PGGM Infrastructure Fund and Australian Retirement Trust ("ART")** support a Macquarie AirFinance acquisition estimated at $US2.2 billion. more>
- **Magellan** reports net outflows of $2.6 billion in December, including retail outflows of $0.6 billion and institutional outflows of $2 billion. more>
- **K2 Asset Management** announces its partnership with **GAM** to manage its long/short Select International Absolute Return fund. more>
- The Supreme Court of New South Wales approves the acquisition of **Pendal** by **Perpetual.** more>
- **Abrdn** announces its intention to establish a strategic partnership with **SG Hiscock (SGH)** for the firm to become abrdn's wholesale distribution partner in Australia. more>
- **NAB** welcomes a new stablecoin pegged to the Australian dollar, called the AUDN; to follow ANZ with the successful execution of the first-ever, Australian bank-issued stablecoin payment. more>
- **KPMG** announces the themes that it believes will dominate this year super fund discussions and decisions; mergers, market volatility, climate risk and member acquisition to be some of them. more>
- **Vanguard** predicts that increased flows into fixed-income ETFs will persist over the coming year; after picking up significantly in the final quarter of last year. more>
- **APRA** imposes additional licence conditions on Diversa Trustees; to set the baseline expectations for independent trustees within the superannuation industry. more>
- **Insignia Financial** announces an increase of $7.4 billion (+2.7%) in funds under management and administration (FUMA) in Q2 FY23 despite exiting its 45% stake in JANA. more>
- **Magellan Global Fund** explores increasing its weighting to China as it believes its re-opening will lead the country to be the story of 2023. more>
- **HESTA** calls for the Australian government to address gender inequities in superannuation and improve financial security for women. more>
- **Pinnacle** reports a significant decline in net profit after tax for the first half of the financial year, with a fall of 24 per cent. more>

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MARKET RECAP CONTINUED

Announced February

- **BetaShares** announces a growing number of investors placing more of their portfolio in ethical, responsible and sustainability-themed ETFs with $9.2 billion in funds under management (FUM) at the end of 2022 against $7.5b at the start of 2022. more >
- **Global X** welcomes the Global X S&P/ASX 200 Covered Call ETF (ASX: AYLD), the first of its kind to track the S&P/ASX BuyWrite Index. more >
- **HESTA** calls for the Australian government to address gender inequities in superannuation and improve financial security for women. more >
- **Maple-Brown Abbott** partners with **Hyde Park Investment (HPI)** to distribute the boutique investment manager's UCITS funds in the UK and several European countries. more>
- **Alphinity Investment Management** introduces the listing of two global equities funds on the Australian Securities Exchange (ASX) — the actively managed Alphinity Global Equity Fund (ASX: XALG) and the Alphinity Global Sustainable Equity Fund (ASX: XASG). more >
- **HSBC** appoints Link's Retirement & Superannuation Solutions (RSS) business to oversee the bank's Occupational Retirement Scheme Ordinance (ORSO) clients. more >
- **The Reserve Bank of Australia (RBA)** raises interest rates to 3.35%; to announce that there are more rate rises ahead. more >
- **Magellan** announces statutory net profit after tax of $83.8 million for the second half of 2022-down 67%. more >
- **Westpac** announces that it will now pause the planned closure of its bank branches in regional areas while a Senate inquiry into the issue is undertaken. more >
- **Asendium** introduces its software to the University of Technology Sydney's financial advice students; to offer practical experience before they graduate. more >
- **ClearView Wealth Limited** shares its plan to divest its wealth management business; to enter into an agreement with investment management and technology company, Human Financial. more >
- **Commonwealth Bank Group Super (Group Super)** enters into a memorandum of understanding to pursue a merger with Australian Retirement Trust (ART). more >
- **HUB24** reports strong results for 1H23, with the financial services provider's funds under administration (FUA) growing to $73 billion. more >
- **Yarra Capital Management** appoints **Apex Group** to support its new $100 million private capital fund. more >

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MARKET RECAP CONTINUED

Announced March

- **BetaShares'** monthly ETF review shows that despite falling share markets, net inflows led to a slow but positive growth for the industry. more >
- **CareSuper** makes some changes to its insurance offering; to include a change to the definition of total and permanent disablement (TPD). more >
- Digital advice platform **Intelliflo** welcomes officially its shop in Australia, following the successful trial of its Aussie adapted 'Intelliflo office' advice software last year. more >
- **HUB24** reports strong results for 1H23, with the financial services provider's funds under administration (FUA) growing to $73 billion. more >
- **Morningstar** launches six managed accounts products that aim to help financial advisers achieve their clients' investment objectives; to use both active and passive investment strategies across managed funds and exchange-traded funds. more >
- **Optimum Pensions** urges super trustees to insure life expectancy and mitigate mortality risk to meet Retirement Income Covenant objectives. more >
- **Sequoia Financial Group** divests 80% of its equity interest in the stockbroker to New Quantum a digital wealth platform for $40.5 million. more>
- **ALT Financial Group** is convicted on multiple charges, including failing to lodge annual financial reports with ASIC, and fined a total of $123,000; to be one of the largest handed down for these breaches. more >
- **Cboe Australia** migrates to Cboe technology, marking the completion of an 18-month integration effort; to follow Cboe's acquisition of Chi-X Australia in July 2021. more >
- **ClearView** unveils a variety of enhancements to its flagship life insurance product range, ClearView ClearChoice; to simplify product names across the income protection (IP) range to increase clarity for both customers and advisers. more >
- **Credit Suisse** decides to withdraw three key proposals to the 2023 annual general meeting (AGM) of shareholders as it prepares for an AU$4.8 billion all-share acquisition by UBS. more>
- **Exelsuper** announces a partnership with Activus Investment Advisors to establish its separately managed accounts; to be available on the Macquarie Wrap platform and accessible to all Exelsuper's clients. more >
- **The Institute of Financial Professionals Australia (IFPA)** rejects the proposal to legislate an objective of superannuation and supports consistency in future policymaking around superannuation. more >

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INDUSTRY
MOVEMENTS

Announced January

- BGL Corporate Solutions promotes **Daniel Tramontana** as its new Chief Executive; to take over from **Ron Lesh**, Managing Director. more >
- Cbus Super Board Directors **Anne Donnellan** and **Frank O'Grady** step down; to be replaced by **Abha Devasia** and **Dave Noonan.** more >
- First Sentier Investors (FSI) appoints **Jane Daniel** as its new Chief Risk Officer; to be based in London. more >
- Grosvenor welcomes back **Chris Robertson and Pascale Dreyer;** to re-join in Melbourne as senior managers. more >
- Perpetual appoints **Anthony Aboud** as its new Deputy Head of Equities within the asset management business; to follow **Vince Pezzullo's** recent promotion as Head of Equities. more>
- The Risk Management Society (RIMS) appoints **Jennifer Santiago** as its new President for 2023; to be effective January 01. more >
- CBRE Investment Management appoints **Sandy Padilla** to the role of APAC Head of Research. more >
- Dexus announces **Paula Dwyer** and **Rhoda Phillippo** to its funds management board as its new Independent Non-Executive Directors; to be effective 1 February 2023. more >
- First Sentier Investors announces former Aegon Asset Management Global Chief Risk and Compliance Officer **Jane Daniel** as its new Chief Risk Officer on board. more>
- New Forests Chief Executive **David Brand** departs; to be looking at strategic growth opportunities in new markets and new geographies. more >
- AZ Next Generation Advisory (AZ NGA) appoints **Dan Heckendorf** as its new Chief Financial Officer; to report to AZ NGA Chief Executive **Paul Barrett**, interim Chief Financial Officer. more>
- MA Financial Group welcomes **Nikki Warburton** to its board of directors; to have more than 30 years of experience in consumer, brand, and marketing across a range of industries including automotive, advertising and media. more >
- Natixis Investment promotes its Manager Head of Asia Pacific **Fabrice Chemoun** to its new Head of International Distribution. To oversee the distribution activities of EMEA, APAC and Latin America. more >
- Fulcrum Asset Management and Ironbark Asset Management appoint **Angus Carson** as their new Product Specialist and Country Head Fulcrum Australia. more >

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INDUSTRY
MOVEMENTS

Announced February

- APRA makes changes to structure and responsibilities of its executive team and appoints a new Executive Director, Superannuation. more >
- Aware Super promotes **Damien Webb** as its new Head of International; to be now in charge of its offshore expansion program. more >
- HUB24 welcomes **Amy Rixon** as its new Chief People Officer; to join the group executive team with over 20 years of leadership and HR experience. more >
- Maple-Brown Abbott Head of Asia Pacific Equities **Geoff Bazzan** retires after almost three decades at the investment firm. more >
- Prime Super General Manager of Investments **Jane Kang** departs the profit-to-member fund; to leave the fund after seven years. more >
- Rest appoints **Andrew Bambrook** as its new Head of Property; to join from TelstraSuper where he headed up the real assets team for six years. more >
- Cboe Australia hires **Vic Jokovic** as its new Chief Executive; to vacates the top job on 31 March 2023 and will be succeeded by **Emma Quinn**. more >
- CountPlus appoints **Lisa Chambers** as its new Chief Risk Officer; to come from Australian Executor Trustees (AET). more >
- Pengana Capital Group announces a new capital markets division and appoints **Philip Schofield** to head it up. more>
- AXA Investment Managers (AXA IM) appoints four external members to the advisory committee of its recently launched AXA IM Investment Institute; to be **Olivier Blanchard, Nigel Topping, Marie-Christine Korniloff and Nicolas Loz De Coetgourhang.** more >
- DASH welcomes former BT manager **Tim Rogers** as its new Head of Distribution among eight new hires to its development, operations, marketing, and sales teams. more >
- The Queensland government investor (QIC) hires **Simon La Greca** as its new Global Head of Private Debt; to replace **Andrew Jones** stepping down from his role this month. more>
- TelstraSuper welcomes **Melinda Huggins** as its new Executive General Manager of TelstraSuper's financial planning arm, bringing over 30 years of experience in leadership, change management and financial services. more>
- Zenith Investment Partners promotes **Glenn Boyes** to the role of Head of Sales and appoints **Ben Bell** as Business Development Manager (BDM) – NSW and Western Australia. more>

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INDUSTRY MOVEMENTS

Announced March

- Australian Retirement Trust (ART) welcomes several high-profile appointments to its board and investment committee: **Mark Burgess** joins as a Board Director and member of the investment committee. more>
- Blue Orbit Asset Management Operating Chief **Lewis Bearman** departs; to take a break from executive roles. more>
- Credit Suisse's Head of Real Estate **Rahul Bharara** is named Gurner Groups first Chief Investment Officer; to have spent close to three years as Credit Suisse Australias Head of Real Estate. more>
- HESTA Investment Committee Chair and Independent Director **Mark Burgess** steps down from the board at the end of June following six years in the role. more>
- Abrdn Global Chief Economist **Jeremy Lawson** resigns; to return to Australia after 10 years in the role. more>
- Airlie Funds Management Founder **John Sevior** retires after spending more than 30 years in the industry. more>
- Aware Super's Equities Managers **Tim Riordan and Mike Teran** quit their role at the super fund to set up their own fund. more>
- Bravura Solutions Group Controller **Harmen Fredrikze** resigns from the role after three months to pursue other opportunities. more>
- HSBC appoints **Charis Martin-Ross** as its new Head of Corporate Sustainability for Australia; to have over 20 years of experience. more>
- Bank of Queensland appoints Current chairman **Patrick Allaway** as its new Managing Director and Chief Executive for the period up to December 2024. more>
- BlackRock's iShares hires **Nicholas Peach** to lead for markets and investments; to take the official title of APAC Head of Markets and Investments for iShares and index investments based in Hong Kong. more>
- Cboe Australia welcomes former ASIC Commissioner **Cathie Armour** as its new Non-Executive Director on its board; to be effective from 1 April. more>
- GCM Grosvenor opens an office in Sydney and appoints Head of Australia and New Zealand from HSBC Andy Lukas to lead the firm's push into the region. more>
- MLC Asset Management appoints **Grant Mizens and Ben McCaw** as joint Head of its Capital Markets Research Team and Co-Portofolio Managers of Choice Products. more>

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B&K
CATCH UP

What we've BEEN UP TO
THIS QUARTER



JANUARY

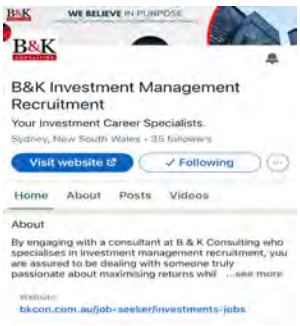
After a well-deserved Christmas break for the team, January was a quiet month; however, it was also the perfect time to focus on objectives and strategies for the new year ahead.

In January, Bk` tchmd `mc @mdk rg`qdc vhsg tr sgdhq dwodqhdmbd with l dmsnqrgho `mc `kk sgd admdehsr sgdx snnj nts ne hs-

FEBRUARY

February was a month of celebrations; the team shared an exquisite Saint Honore (traditional French cake) for Anel's and Alexia's birthdays, a great occasion for team bonding.





February also marked the creation of our new showcase page, {B&K Investment Management Recruitment}. A page created to stay up-to-date with what is happening in the Investment Management industry.

MARCH

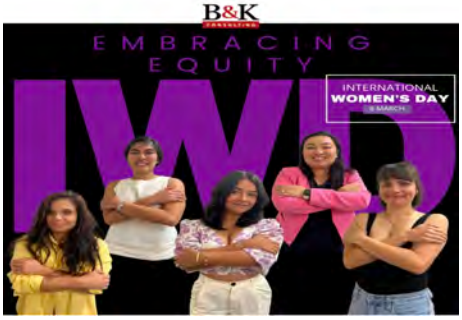
At the beginning of the month, Adrian and Alexia attended an inspiring event: **Engage Sydney,** organised by Bullhorn. We learnt everything about key industry trends and technology innovation.







B&K was proud to achieve another milestone: **3000 followers** on its LinkedIn Page. What an achievement! Thanks to our candidates, clients and team for their continual support.





On the 8th of March, we celebrated International Women's Day and embraced the global theme #EmbraceEquity. For the occasion, the B&K's women went for a yummy lunch at The Grounds Of Alexandria. It was a great moment to discuss and share our views on the topic.

To stay up to date on industry news and movements, as well as what we're up to, follow us on LINKEDIN

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ROLES WE RECRUIT IN

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- Risk & Compliance
- Contact Centre & Administration
- Leadership Roles (Team Leader – General Manager)
- Claims
- Business Analysts
- Project & Change Management
- Continuous Improvement
- Marketing & Communications
- Business Intelligence & Data Insights
- Bid & Tender Management and Underwriting
- Disputes and Complaints

Superannuation

- Product
- Operations
- Contact Centre & Administration
- Relationship Managers & BDM's
- Research & Consulting
- Risk & Compliance
- Leadership Roles (Team Leader – General Manager)
- Continuous Improvement
- Marketing & Communications
- Business Analysts
- Project & Change Management
- Business Intelligence & Data Insights

Investment Management

- Leadership Roles (Team Leader – General Manager)
- Investment Analysts
- Distribution – Business Development, Relationship Management & Product
- Investment Operations
- Fund Accountants
- Marketing & Communications
- Product

Banking & Credit

- Leadership Roles (Team Leader –General Manager)
- Administration and Operations
- Client Services / Customer Service
- Credit Analysts / Assessor
- Collections
- Settlements
- Real Time Analyst
- Financial Crime
- Compliance or Audit
- Lending Specialists

Fintech

- Customer Success / Experience

ABOUT B & K



IN FOCUS

INVESTMENT CAREER SPECIALISTS

Interested in the Fund Management space and the services that come with it?
At B&K we have a dedicated consultant, Conor Walsh, who specialises in recruiting operational and distribution based roles.

If your office is in need of some investment management career support, don't hesitate to reach out to conor@bkcon.com.au

B & K Consulting specialise in recruitment for superannuation, life insurance, banking & credit and investment professionals - for both temporary and permanent positions.

As we solely specialise in the wealth management industry, it allows us to become experts in what we do, enabling us to provide honest, personalised, and thorough services tailored to our clients' specific needs. Understanding your business and background is essential to finding you the best solution.

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