



## **2015 European Economic Outlook**

January 22, 2015 at 6:30 PM  
Paris

Join us for an engaging discussion on the economic outlook for Europe in 2015. Our panelists will discuss key macro-and micro-economic themes and the implications for investors in the year ahead. Hear diverse perspectives on investment opportunities, drivers of return and sources of risk in the region.

### **Participants**

**Jean-Michel Six**, Standard&Poor's Ratings Services  
**Philippe Taillardat**, CFSGAM / First State Investments  
**Nicolas Walewski**, Alken  
**Frederic Jamet**, *Moderator*, State Street Global Advisors

### **Event Details**

**Date:** January 22 2015

**Time:** 6:15 PM Registration

We will begin promptly at 6:30 PM; please arrive early. Since it is disruptive to everyone when latecomers enter the session, those arriving after an education session has begun will only be admitted at the discretion of 100WHF and the host. Please note the start time on this invite and plan to arrive early.

Networking and cocktails will follow

**Hosts:** S&P Capital IQ

**Location:** 40 rue de Courcelles, **Paris**, 75008, France

**RSVP:** [RSVP Now](#)

If you have any questions about this event, please contact the [Paris](#) committee.

**This event is NOT FOR ATTRIBUTION. All 100WHF events are private events and we require that no one reports publicly on any aspect of them.**

**Admission to this event is free, but there is a 20 Euro charge if you register and do not attend (even if you cancel in advance). No-show proceeds will be donated to our 2015 beneficiary.**

If you have no-show fees in arrears, the system cannot register you for an event. You can view and pay for any outstanding no-show fees online from your [Member Profile](#)

Space is limited. No walk-ins will be permitted

## Biographies

### **Jean-Michel Six**, MD, Chief Economist EMEA, Standard & Poor's Ratings Services

Jean-Michel Six is Standard and Poor's Ratings Services Chief European Economist, based in Paris. He held a series of positions for Standard & Poor's economic and financial information division, DRI (Data Resources) between 1982 and 1997, both in Europe and in the US including Chief Economist and Managing Director. He left Standard & Poor's in 1997 to help found Global Partners, Inc., a US-based consulting firm.

Jean-Michel rejoined Standard & Poor's at the beginning of 2005 in New York and subsequently moved back to Europe. Jean-Michel has been a member of the European Central Bank's Shadow Council since 2006. He holds a PhD in Economics from the University of Paris.

### **Philippe Taillardat**, Partner, Direct Infrastructure, CFSGAM / First State Investments

Philippe Taillardat is a partner of Direct Infrastructure for CFSGAM / First State Investments based in Europe. In his role, Philippe's primary responsibility is to interact with clients, originate deal flow and contribute his experience to investment decisions.

Prior to joining FSI in September 2011, Philippe was Co-Founder of Oaksley Conseil, an advisory company providing investment solutions to institutional investors and asset management platforms in the energy and infrastructure sectors. He was previously Managing Director at Amundi Private Equity Funds for three years, where he was responsible for the infrastructure fund selection. Before that, Philippe held various roles at Calyon CIB, AXA, Credit Suisse Group and BNP Paribas. In total, Philippe has 21 years' experience in energy, infrastructure and other industrial sectors, including principal investing, financial advisory, equity and debt financing.

Philippe holds a Master in Business Administration from EMLYON Business School, and an MS in Mechanical Engineering from Arts et Métiers ParisTech with a major in Industrial System Management.

### **Nicolas Walewski**, Founder, CEO, Alken

Nicolas Walewski is the Managing Partner of Alken Asset Management LLP, which he founded in July 2005. He is the portfolio manager of the Alken European Opportunities Fund, the Alken Absolute Return Europe, the Alken Small Caps Europe, and the Alken Capital One Fund. Previously, Nicolas was the fund manager of the Oyster European Opportunities Fund at Banque Syz in London from 1999 to 2005. The Fund outperformed the STOXX 600 by an annualised average rate of 7.3% p.a. over the period. Nicolas began his investment career in 1993 with Credit Lyonnais in Paris as a currency options portfolio manager and then in Frankfurt as an index options portfolio manager. Subsequently, he was a buy-side analyst specialising in media and information technology across Europe and a fund manager responsible for the European equities portfolios with Eur1.2bn assets under management.

Nicolas graduated from Ecole Polytechnique, Paris, and holds a Master's degree from ENSAE (National College of Statistics and Economics). He has 21 years of investment experience.

### **Frederic Jamet**, State Street Global Advisors

Frédéric Jamet is the Head of Investments of SSgA France as well as co-Head of the Index Equity Management Unit. He is responsible for all portfolios managed in Paris including notably the SSgA Index funds, SPDR ETF, the Europe Alpha funds, the Emerging Alpha funds, the Balanced Funds and ISG mandates. Prior to joining State Street Global Advisors France in 1996, he was in charge of new product development and quantitative funds management for the Crédit Lyonnais bank and R&D Manager for the Crédit Commercial de France bank.

Frédéric holds a Master's degree in Mathematics (Ecole Centrale de Lille) and a Master's degree in Finance (DEA Finance). He has worked in the industry since 1989.



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