



executive search

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MELBOURNE
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Tel 61 3 9653 8600

Market Insight – October 2017

“Movers & Shakers”

Corporate & Investment Banking

- Aidan Allen Head of Investment Banking, Australia & New Zealand with Citi, has rejoined UBS as Co-Head of Investment Banking.
- Edouard Riquet previously Associate Director, Trade Finance with Westpac, has joined Rabobank as Senior Associate Director, Trade & Commodity Finance.
- Annabelle Mooney previously Head of Financial Sponsors at BAML, has joined PwC as a Partner for its newly created financial sponsors team.
- Mark Warburton Head of ECM Origination & Senior Managing Director at Macquarie Group is stepping down from his role.
- Paul McTaggart, prior Head of Metals & Mining Research at Credit Suisse, has joined Blackpeak Capital as Managing Director, Natural Resources.
- Mathew Fulton has left the Commonwealth Bank where he was Executive Director, Middle Market Private Equity to join Investec.
- David Tozer has left Houlihan Lokey where he was Managing Director. He is setting up his own restructuring firm, Tozer and Co.
- Jason Hale has joined Westpac as Director Corporate & Investment Banking (Industry Analytics – Infrastructure & Utilities). He has prior experience with SMBC as Head of Australia & New Zealand, M&A and Sponsor Finance.
- Samuel Condon has joined Mitsubishi UFG as Director, FIG. He was previously with the Commonwealth Bank.
- Don Shearman, ex China Construction Bank & Metrics Credit Partners, has joined United Overseas Bank as Director, Client Coverage, Specialised Finance.
- Sean Joseph previously Head of Global Loans and Advisory for Asia Pacific, Europe & Americas with ANZ based in Singapore, has joined Clearwater Capital as a Director in Sydney.
- Angus Hamilton & Chris David have both joined Morgan Stanley as Vice Presidents. Angus joins from RBCCM & Chris joins the FIG team from Deutsche Bank.
- Mikhail Mohl previously Equities Analyst covering A-REIT with Credit Suisse, has joined Goldman Sachs investment banking team.
- Adam Callaghan previously with CVS Lane Capital Partners has joined Development Finance Partners in Brisbane as an Associate Director.
- Tom Carmody, ex Commonwealth Bank has joined Grant Samuel as an Executive.
- Raymond He, Senior Associate at NAB covering consumer, healthcare & agriculture has joined CIBC as Associate, Project Finance.
- Alexander Burrell has joined Credit Suisse as an Investment Banking Analyst in the natural resources team, he joins from Nomura.
- Andrew Clements has joined Scotiabank as an Associate, Origination. He joins from Commonwealth Bank.
- Roman Luchkovsky has joined HSBC as a Relationship Executive. He was previously Senior Associate, Leveraged & Acquisition Finance with CIC.
- Neon Shariful previously with Blue Ocean Equities, has joined Goldman Sachs as an Associate.

Private Equity, Principal Investments & Family Office

- Paul Foster has joined Pacific Equity Partners in a senior role. Paul has prior experience with AMP Capital where he was most recently Head of Infrastructure for Australia & New Zealand.
- Chris Jagger has joined the New Zealand Venture Investment Fund as an Investment Director. He has prior experience with Green Cross Health & NZ Super Fund.
- Robert Williams has joined Artesian Capital Management as a Director, he was previously with Macquarie's MIRA team as Manager.
- David Lang previously of Pamplona Capital Management, will be joining the KKR team in early 2018.
- Maximilien Penel, ex KPMG has joined Partners for Growth as an Investment Associate.



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- Alex Tandl has joined ROC Partners as an Associate, he was previously with Strategy&.
- Samantha Carberry formerly with PEP, has joined Ben Gray's BGH Capital as an Investment Adviser.
(*It was incorrectly published that David Brooks joined BGH Capital in the August 2017 edition of Market Insight.*)
- Menno Veeneklaas has joined Allegro Funds as an operational partner, he was previously with Partners in Performance as a Director.
- Kon Knafelman has joined Alceon as an Investment Associate from KPMG.
- Ashley Sorrenti is joining the Riverside Company as an Investment Analyst from Credit Suisse.
- Jack Zhang & Alexander Assim have joined Arowana International as Investment Analysts. Jack joins from Goldman Sachs & Alexander joins from RBS (London).

Global Markets, Equities & Treasury

- Paul Stanwix previously with State Street, has joined NAB as Associate Director, Corporate Finance, Securitisation Origination.
- Harry Boghossian, ex Goldman Sachs has rejoined Macquarie as Associate Director leading coverage of the small caps sector.
- Jonathan Battershill, ex UBS metals & mining Analyst has joined Ian Middlemas' Salt Lake Potash as a corporate executive.
- Josh Kannourakis has joined UBS small caps coverage team from Baillieu Holst, where he was an Equity Partner.
- James McIntosh has joined CLSA in a small cap sales role, he joins from Blue Ocean Equities and has prior experience with RBS.
- Russell Wright Director, Research from APP Securities resigned in August to join EverBlu Capital. He is replaced by David Fraser, ex Shaw & Partners. Steven Larkins also joins APP Securities as Director, Investment Banking, he was previously CEO at High Peak Royalties.
- Will Peterson formerly Head of Credit Risk at APRA, has joined Aura Group as Director, Debt Capital Markets.

Funds Management

Distribution & Advice

- Monica Hood, ex Hunter Hall, has joined Folkestone Funds Management in a business development role.
- David Whitby, prior with Betashares has joined Bennelong Funds Management in a newly created role of Director, Wholesale Sales NSW.
- James Noone, ex Head of Sales at Financial Advice Matters, has joined PM Capital as a Sales Director based in Brisbane.

Investments

- Kylie Willment will be joining Mercer as CIO in October. She joins from NSW Treasury Corporation (TCorp) where she was most recently a Senior Manager, Investment Advisory & Stewardship.
- Mark Levinson has joined Macquarie's Portfolio Solutions team, previously he was a Partner with MST Capital.
- Tim Powditch, previously Partner at Bligh Capital, has joined Glennon Capital as a Portfolio Manager.
- Greg Michel previously Head of Fixed Income and Currency Research with JANA, has joined NAB as Portfolio Manager, Diversified Portfolios.
- Deepan Pavendranathan, Head of Portfolio Trading for Goldman Sachs will be joining Regal Funds Management as Head of Events & Trading for Australia & Asia following a period of gardening leave.
- Robert Moore ex Russell Investments, has joined JANA as Senior Consultant / Head of Fixed Interest Research.
- Blake Young has joined Metrics Credit Partners, previously he was CFO & Head of Syndicated Investments at Equitise. Kristen McNally & Raymond Tie also join the team as Investment Associates, Kristen joins from ANZ & Raymond joins from Goldman Sachs.
- Mike Blackwell has been appointed as US based THL Credit Advisors' Australia & New Zealand Representative. He has prior experience as Director, Fixed Income Sales, Australia & New Zealand at Credit Suisse.
- Ramoun Lazar previously industrials materials Analyst at UBS, has joined Macquarie's High Conviction Fund.
- Arden Jennings has joined Ausbil Investment Management as an Equity Analyst, he joins from Hunter Hall where he was a Portfolio Manager.
- Deborah Ford has joined Challenger as Analyst, Real Estate Lending. She was previously with Westpac as Associate Director, Property.
- Adam Alexander previously Research Analyst & Head of Consumer, Retail & Entertainment coverage has joined Evans & Partners' asset



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management team.

- Matthew Spence, prior Head of Infrastructure, Utilities & Transport Research at BAML, has joined UniSuper (Melbourne) as Investment Manager.
- Claire Vuong previously with Campus Living Villages & Deloitte, has joined AustralianSuper as an Investment Analyst.
- Martina Song & Sam Heffernan have both joined Yarra Capital Management as Macro Analyst, Fixed Income & Investment Manager, Credit respectively. Martina joins from Westpac & Sam joins from S&P Global.
- Alister Walker & Marina Wang have joined John Laing. Alister joins as a Senior Investment Manager in Sydney, he was previously at Itochu where he was an Investment Director. Marina joins as an Investment Associate in Melbourne, she was previously with the Commonwealth Bank where she was Associate Director, Project Finance.
- Marc Durka has joined InfraRed Capital Partners as an Investment Analyst, he joins from PwC.
- Vethooshan Siritharan has joined AMP Capital as an Associate in the Energy team. He joins from Ernst & Young.
- Rosie Malcolm has joined Magellan Financial Group as an Investment Analyst, she has prior experience with Foglamp Capital in New York.
- Aprelle Coady has joined Plenary Group as an Analyst. Previously she was an Associate in the project finance team at Commonwealth Bank.
- David Sokulsky has joined Aberdeen as CEO & CIO of their Aberdeen Leaders LIC. Prior he was with at UBS Wealth Management.

Corporate Development & Risk Management

- Aaron Hood has joined Wesfarmers in Perth, he was previously with EMR Capital as Director, Corporate Finance in Melbourne.
- Mark Howell previously a Director with Rothschild has joined Coles in Melbourne as Head of Business Development.
- Grace Gow has joined Morrow Sodali's GPS Proxy business as Senior Business Development Executive. She was previously with CLSA.
- Jaki Virtue has joined NAB as General Manager, Transformation, Corporate & Institutional Banking, she was previously with UBS in Hong Kong as Managing Director, COO & Chief of Staff.
- Mark O'Sullivan has joined Adamantem Capital as COO. Mark has prior experience as an Audit Partner with Ernst & Young.
- Cathy Montesin has joined InterFinancial in Brisbane as a Director, she has prior experience with Cleanaway and Ernst & Young.
- Aaron Sun ex KPMG Corporate Finance Manager, has joined MoneyMe.
- Suhail Nasir has joined Campus Living Villages as a Corporate Finance Manager from KPMG.
- Rohit Rangarajan prior an Associate with Deutsche Bank's consumer & general industrials group, has joined QANTAS' corporate strategy team.
- Victoria Arthur has joined VGI Partners as an Investor Relations Manager. She has prior experience with Constellation Advisors & Citi.
- Therese Kenny has joined LUCRF as CFO from Hostplus where she was Group Executive, Finance & Investment Operations.
- Navodit Narain previously Division Director for Macquarie's infrastructure advisory & debt markets team, has joined Endeavour Energy as CFO.
- Tomas Chubb who was Investment Director at Archer Capital has joined Allity Aged Care as Director of Strategy & Corporate Development.
- Neena Vajani has joined HSBC as Associate Director, Team Lead Credit Analysis Unit. She has prior experience with Goldman Sachs India & BAML Sydney as Vice President, covering corporate treasury.
- Jacqueline Purcell previously with Morgan Stanley (New York) as Executive Director, M&A, has joined Culture Amp (Melbourne) as Vice President, Strategy & Operations.
- Richard Osborne previously with KPMG as Executive, Corporate Finance is joining Westpac's business development / ventures team.
- Belinda Cang has joined Pacific National as an Analyst from Crowe Horwath.

**We are keen to hear your feedback or should you require further information,
please contact Nissa Foster on 02 9235 9400 or nfoster@jmichel.com.au**

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