



executive search

SYDNEY
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SYDNEY NSW 2000
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MELBOURNE
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41 Exhibition Street
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Tel 61 3 9653 8600

Market Insight – October 2019

“Movers & Shakers”

INVESTMENT & CORPORATE BANKING

Investment Banking

- Hein Vogel has departed Investec where he was Head of Emerging Companies & Financial Services.
- Duncan Hogg who was Managing Director, Investment Banking at BAML has joined EY as a Partner in Sydney.
- Steven Boggiano has joined Allier Capital as Managing Director. Steven previously founded Magnes Capital and was also Managing Director & Head of Healthcare, Consumer, Retail & Real Estate at Barclays.
- Anna Ellis previously Investment Director with Besen in Melbourne, has also joined EY as Director, PE & Deal Origination, Transaction Advisory Services.
- Grant Mansell has joined Investec as Director, Corporate Advisory. He has prior experience as Director, M&A with HSBC. Pierre Josset also joins Investec's Corporate Advisory team, he was previously an Associate with Aura Group.
- Nomura has hired Srihari Sharma as a Senior Associate, FIG from Investec, Ben St Claire as an Associate from Blackpeak Capital and Henry Ball, ex EY as an Investment Banking Analyst, Consumer, Retail & Healthcare.
- Benjamin Gribble has joined Houlihan Lokey as an Associate, he was previously with Moelis Australia as an Investment Banking Associate & Houlihan Lokey in London.
- Nicholas Tregoning joined Moelis Australia as Senior Analyst, Investment Banking, Nicholas joins from Shaw & Partners.
- Gigi Li has joined Ironstone Capital as an Analyst from KPMG.
- Samantha Riegel (ex FTI Consulting) & Ice Tan & have joined Highbury Partnership as Analysts.
- Macquarie Capital has hired Anthony Yao, ex Lazard, as an Analyst in the General Industrials teams, Rita Dalton joins as an Analyst in the TMET team from Nomura & James Watkins ex Flagstaff Partners Analyst joins the firm's resources team.
- Daniel Zhang has joined UBS as an Investment Banking Analyst from Ironstone Capital.
- Jarrod Tobin has joined Aquasia as an Analyst from Deloitte.
- Chao Liu has joined CLSA as an Investment Banking Analyst from PwC where he was a Senior Consultant, Deals Advisory.
- Lisa Tran has joined Mark Dorney's Chevalier Capital as an Analyst. She was previously with PwC as Senior Consultant.
- Thomas Fawcett has joined Stanton Road Partners as an Analyst. He has prior experience with Luminis Partners.
- Luke de la Cour has joined Rothschild & Co as an Analyst from PwC where he was a Consultant.

Corporate Banking / Debt Products

- David Byrne has been appointed as Partner, Debt & Capital Advisory with PwC Melbourne. David was previously with Navigate Capital Group & ANZ.
- Katie Tabb & Alli Peacock have joined JP Morgan's Corporate Client Banking & Specialised Industries team reporting to Annabelle Mooney. Katie & Alli were previously with PwC's Financial Sponsors team as Director & Associate Director respectively, they join as Vice President & Associate.
- Alexandra Bennett has joined ING as an Associate, Leveraged Finance, she was previously an Analyst with the Commonwealth Bank.
- Andrea Cancelli has joined Citi's leveraged finance team, he joins from Deutsche Bank, where he was an Investment Banking Associate, Leveraged Finance.
- James Simpson has joined Gresham as Associate Director, Debt Solutions. He was previously with Lazard as Vice President, Corporate Advisory.
- Jennifer Estrada has joined NAB as Associate Director, FIG - previously with the Commonwealth Bank.
- Nicole Yak has joined ANZ as Associate Director, Trade & Supply Chain. She was most recently with HSBC as Senior Business Development

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Manager, Global Trade & Receivables Finance.

- Leigh Bowman has joined AMP Capital as an Associate Director from PAG as a Senior Associate.
- Andrew Cottam has joined Savills as Director, Capital Advisory from JLL where he was Director, Debt Advisory.
- David Filipetto previously with Commonwealth Bank as Associate Director, Natural Resources & Energy based in London, has joined HSBC as Associate Director, Leveraged & Acquisition Finance
- Michael Pi has joined OCBC Bank as an Associate Director from APA Group, where he was most recently a Treasury Manager.

Global Markets, Equities & Treasury

- Haan Ti has been appointed as Head of Capital Markets at Standard Chartered Bank. He was previously Executive Director & Head of ABS Australia & New Zealand at MUFG Securities.
- Ben Nelson has been appointed as Head of Equities Sales with RBCCM, he was previously with Citi as Director, Institutional Equity Research Sales. Ex Goldman Sachs Traders James Lambert & Matt Rae have also joined the team.
- Scott Ramsay has joined Ord Minnett in Melbourne. He was previously with RBCCM most recently as Director, Head of Melbourne Institutional Sales.
- Max Germanos ex Head of Corporate Finance & Client Strategic Solutions at Investorlink Group, has joined NAB as Head of Product & Channel Distribution.
- Shawn Lee has joined CLSA's small caps team from Adam Smith Asset Management where he was an Investment Analyst.
- Katherine Mattick has joined Investec as Analyst, FICC from Macquarie's CAF team where she was an Executive.

ALTERNATIVE INVESTMENTS

Private Equity / Family Office / Credit

- Moritz Von Hauenschild has been appointed as Managing Director & Head of Direct Equity at Gresham. Moritz was previously with Macquarie CAF as Senior Managing Director.
- MaxCap Group has joined with New Zealand firms Bayley Corp Ltd & brokerage Forsyth Barr Ltd – appointing Mark Farrands as CIO (ex ASB Bank).
- Oliver Trajcevski has been appointed as Managing Director with Moelis Australia, he has prior experience as Executive Director with Dinimus Capital.
- Nick Dignam, Nick Miller, Bryan Brown & Sam O'Connor (all ex Blue Sky Growth Capital) have set up Fortitude Investment Partners together.
- Benjamin Dunphy & Jonathan Hodson, both ex Blue Sky Alternative Investments, have founded January Capital.
- Vincent Gerritsen has been appointed as Head of Private Markets Europe with HRL Morrison & Co based in London. Vincent has prior experience with Ancala Partners as a Partner.
- Mark Harrison has joined Blackstone's real estate business. He was previously Head of Capital Transactions with Charter Hall.
- Bruce Plasto has been appointed as Head of Private Credit with ROC Partners, he was previously with Macquarie Capital as Head of Middle Markets. Aaron Mbakwe also joins the firm as Vice President, he was previously with Credit Suisse as an Associate (TMT & Sponsors).
- Daniel Walters has been appointed as Senior Investment Director, Infrastructure with AustralianSuper. He was previously Executive Director at Morgan Stanley.
- Daniel Hong will be joining Besen as Executive Director - Investments in December. He was previously with M.H. Carnegie & Co.
- Sid Khotkar previously Principal at TPG Capital, is currently working with the team at Future Fund, as a Director.
- Natasha Morris has been appointed as Director, Responsible Investing with Adamantem Capital. She has prior experience with the Centre for Evidence and Implementation & Social Ventures Australia.
- Michael Thompson has joined Edison Partners as an Investment Director. He has prior experience with Livingbridge & Archer Capital.
- David Cibura previously Senior Portfolio Manager with JCP Investment Partners, has joined Myer Family Investments.
- Sam Franklin, ex Associate with Affinity Equity Partners, has joined EQT Partners in Singapore as Vice President.
- Lloyd Jardine has joined HRL Morrison & Co as Investment Manager, he joins from Luminis Partners where he was previously Vice President.

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- Fraser Christie has joined TDM Growth Partners as an Investment Manager. Prior, he was with Anchorage Capital Partners.
- Sambit Mishra has joined Next Capital as an Investment Associate, he was previously with UBS as an Associate Director.
- Ada Wu, ex Deutsche Bank, has joined Affinity Equity Partners as an Investment Associate.
- Victoria Clarke has joined KKR as a Private Equity Associate from Pacific Equity Partners.
- Mitchell King has joined BGH Capital in Melbourne as an Associate. He joins from JP Morgan.
- Marc Marinozzi has joined Intermediate Capital Group as an Associate from Commonwealth Bank where he was Senior Associate, Private Equity & Leveraged Finance.
- Johnny Zhang has departed Goldman Sachs Special Situations Group where he was an Analyst, to join HPS in New York
- Will Reeves has joined StepStone Group as an Analyst from PwC.
- Aimee Jordan, ex BAML Analyst has joined Spheria Asset Management as an Investment Analyst.
- Edward Hogan has joined The Blackstone Group as an Analyst from Moelis, where he was in the real estate team.
- Mina Rafia has joined Greensill Capital as an Analyst from Macquarie's structured credit risk team.
- Jonathon Meagher & Johnny Polinati have joined CSC as Investment Analysts from HSBC & Investec respectively.
- Peter Chen has joined Brookfield Asset Management's real estate team as an Associate. Prior, he was with Macquarie's CAF team.

FUNDS MANAGEMENT

Distribution & Advice

- Tamas Calderwood has joined elinvest as a Distribution Specialist. Prior he held roles with BetaShares and MSCI.
- Anne Hamieh, ex Vanguard, joins Xplore Wealth as Head of Distribution.
- Mandy Mannix has been appointed as General Manager, Distribution at MLC in their asset management division. She has prior experience with F&C Management & BMO Global Asset Management in London.
- Nicki Ashton, ex Russell Investments' Head of Strategic Partnerships has been appointed as Executive Director & Head of Australia, Global Relationship Group with IFM Investors.
- Ty Thurgood, ex Nomura Asset Management, has joined Eaton Vance as Director of Institutional Business Development.
- Adam Quaife will join Perpetual Investments later this year in the role of General Manager Distribution. Prior, he spent several years with Franklin Templeton.

Investments

- Justin Delaney joins Zurich as Chief Executive, Life & Investments. Prior he held roles with TAL Life and Macquarie.
- David Lamming has been appointed as CEO, Asia Pacific for Plenary Group.
- Simon Klimt has been appointed as Managing Director for Gresham's Resources Royalties Fund, he held prior roles as CEO of Royalty Stream Investments and Director at Barclays Capital.
- Troy Rieck joins LGIA Super as CIO. Previously he held roles with Equisuper and Suncorp.
- Luke Buccheri, Wilson Nghe & Lucina Martin have joined Magellan as Investment Analysts. Luke joins from Australian Super, Wilson joins from UBS & Lucina joins from Morphic Asset Management.
- Danielle Welsh-Rose, ex VFMC, has joined Aberdeen Standard Investments as their ESG Investment Director - Asia Pacific.
- Phoebe Cooper has joined Warada Capital as an Analyst, she was previously at Lazard.

CORPORATE, GOVERNMENT & RISK MANAGEMENT

- Will Owen has been appointed as Global Strategy Manager, APAC with Xero. He has prior experience with Arjo & Deloitte.
- Jim Metaxas has been appointed as Managing Director, Head of Asia Pacific with TAO Solutions. He was previously Director, Structured Solutions with Moody's Analytics.
- Matt Wilson previously of Flagstaff Partners, will be joining Orora Group as Head of Strategy in the new year.
- Matthew Dive has joined John Laing as Value Enhancement Manager. Matthew was previously with Transport for NSW.



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- Nikki Bentley has joined EY as a Partner in the financial services team. Prior she was a Lawyer with Norton Rose Fulbright and Henry Davis York.
- Helen Cox, ex Commonwealth Bank where she was Executive Manager, External Investment Development has joined Macquarie's Telecom Group as CFO.
- Ethan Quan has joined Commonwealth Bank as Senior Manager, Group M&A. He has prior experience with KPMG & PwC.
- Iris Energy has appointed Bom Shin as Chief Financial Officer. He has prior experience with RBCCM as Vice President, ECM. Ryan Cahill also joins the firm as Executive Project Director (London), he was previously with DNW Group as Head of Operational Strategy & New Ventures as well as having worked for BCG.
- Cassandra Matthews will join George & Matilda Eyecare as a CFO. She was previously with KordaMentha as a Partner.
- Kevin Lee has joined Caltex' Business Development team. Kevin has prior experience with Goldman Sachs & Healius.
- Matt Helman has been appointed as General Manager, M&A with Woolworths, he was previously a Director at UBS. Lillian So has also joined Woolworths as an Associate. She has prior experience with Healius & UBS.
- Mark Adams has been appointed as Chief Risk Officer with Westpac's Institutional Bank, prior he was Executive General Manager at APRA.
- Shane Scott has been appointed as Head of Credit with AMP, he was previously with Kiwibank for 4 years, most recently as General Manager, Credit.
- Claudia Adamson has joined Legend Corporation as a Corporate Development Executive. She was previously with Deloitte.

**Correction to our August Insight, David Cockerell has not joined Oaktree.

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

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