



executive search

SYDNEY  
Level 15  
60 Castlereagh Street  
SYDNEY NSW 2000  
Tel 61 2 9235 9400

MELBOURNE  
Level 9  
41 Exhibition Street  
MELBOURNE VIC 3000  
Tel 61 3 9653 8600

## Market Insight – July 2021

### So what sort of “tool” are you then???

I was out with a former placement, now client and friend the other day over green tea and an oat milk piccolo (look what has become of us!) & was momentarily taken aback when my companion referred to a high-profile hedge fund manager we were talking about as “a total tool”. Strong words indeed from an upstanding, highbrow member of our investment community, I thought.

“Sorry?!” I said. He replied. “No, I mean in a highly tuned, deeply effective way, like a top of the range sushi knife. One made of high-grade steel, designed for one purpose only & not much use for anything else. Whereas me being a PE guy, am more of your Swiss Army knife, can turn my hand to all sorts of investment scenarios. For example, that hoof pick thing designed to get stones out of horses hooves – very handy for removing recalcitrant non performing CEOs from portfolio companies for example.”

So I got to thinking about other “tools” & how they might relate to different fund managers & their strategies or respective talents. Instantly a chainsaw sprung to mind (remember “Chainsaw” Al Dunlap the notorious turnaround specialist who worked for Packer at CPH in the 90’s?)

Or a more benign tool like an everyday table knife could represent an index hugger or ETF manager - sensible, low risk but a bit dull perhaps?

So I ask you, what sort of “tool” might you be? Or what fund management technique might you equate to a tool or kitchen implement?

## “Movers & Shakers”

### BANKING & MARKETS

#### Investment Banking

- Dragi Ristevski has been appointed as Managing Director & Head of Financial Sponsors APAC & Senior Client Partner Australia with Credit Suisse – and more recently co-head of Investment Banking. Dragi joins from Citi where he spent 10 years and was most recently Managing Director, Head of General Industrials & Financial Sponsors.
- Adam Penny previously with Westpac as Head of Corporate Development, has joined JP Morgan as Head of Financial Institutions Group Coverage. Kierin Deeming who was previously with Credit Suisse has also joined JP Morgan as Head of M&A. Kyra Hannaford previously with Jefferies, has joined JP Morgan as Executive Director, ECM. Olivia Montano has joined the firm as an Investment Banking Associate from Nomura.
- David Hopwood has been appointed as Head of Natural Resources with Deutsche Bank, prior to this he was with BAML as Director, Natural Resources.
- Karl Rozman, Credit Suisse veteran and most recently its Co-Head of Resources, has joined Bank of America to head up its Australian natural resources team.
- Richard Saywell most recently with Citi as Managing Director, Resources, has joined Ord Minnett as Head of Natural Resources.
- Ben Smith & Peng Ly formerly of Investec have launched Aastra Corporate Advisory. Also joining them from Investec in this new venture is Ze Min Hu & James Ye as Partners & Priyanka Garg as Principal.
- Jacqueline Cleary has been appointed as Managing Director, Financial Institutions with Jefferies. Jacqueline is relocating from New York and was previously with BAML. Also coming on board as Senior Vice Presidents are JP Morgan’s Chris Familton (who will head up M&A) and Credit Suisse’s Gordon Kerley (who will cover ECM).
- Paul Early has been appointed as Founding Partner & Head of Mining & Metals with Barrenjoey Capital Partners. He was most recently Co-Head of Barclays Australia. Max Smouha-Ho, ex Nomura Investment Banking Associate has also joined the firm.



JON  
MICHEL

SYDNEY  
Level 15  
60 Castlereagh Street  
SYDNEY NSW 2000  
Tel 61 2 9235 9400

MELBOURNE  
Level 9  
41 Exhibition Street  
MELBOURNE VIC 3000  
Tel 61 3 9653 8600

## executive search

- Alastair McBride-White has joined Bank of America from Credit Suisse where he was Director in the resources, energy & infrastructure team. Nina Zhang (ex Macquarie) & Ben St Claire (ex Nomura) have also joined the bank as Investment Banking Associates.
- Andrew Buchanan previously with Goldman Sachs has joined UBS as an Executive Director covering FIG.
- Kieran Mathivanar, ex 333 Capital, has joined Greenstone Partners as Associate Director, Investment Banking.
- Alexander Wong has joined Jarden as an Investment Banking Associate from Gresham Partners.
- Phenome Chan has joined Azure Capital as an Associate, she was previously with Investec as an Investment Banking Analyst.

### Corporate Banking / Debt Products

- Mark Goddard has been appointed Head of Financial Institutions, Australia with Standard Chartered. Mark is ex ICBC & Westpac.
- Gautam Rao ex Deutsche Bank & HSBC, has been appointed as Head of Private Equity & Leveraged Finance with Commonwealth Bank.
- David Sidoti previously of SMBC, has joined KEB Hana Bank as Managing Director Investment Banking & Head of Project Finance Australia & NZ.
- Nick Crockett & Tom Korda, both previously with Cadence Property Group, have joined KordaMentha as Executive Director & Director respectively.
- Matthew Massey has joined Barclays as a Vice President, he was previously offshore with Cheniere Energy as Manager, Strategic Finance.
- Yi Meng Gong & Nicholas Hall (both previously with Westpac) have joined Societe Generale as Vice President & Associate in the Energy & Natural Resources team respectively.
- Bikram Masson has joined Ernst & Young as Associate Director in the Capital & Debt Advisory team from ANZ Bank.
- Carlo Lucci previously with Westpac as Associate Director, Industrials, has joined Burnvoir Corporate Finance as a Senior Associate.
- Isaac Kim has joined Norinchukin Bank as a Senior Analyst in the project finance team, he was previously with KEB Hana Bank.

### Global Markets, Equities & Treasury

- Mark Malouf Head of Equities Research Sales with Credit Suisse has joined Barrenjoey Capital Partners. Yeeshu Kumar previously Director, USD Swaps & Treasuries Trading Asia in Hong Kong has also joined the firm, Tim Galt, Head of Leveraged & Debt Capital Markets at UBS has joined the fixed income team, Sam Kirtley (ex UBS) and Samuel Cochrane (ex Morgan Stanley HK & UBS London) has also joined the fixed income team. Kody Hayes, previously Vice President at Deutsche Bank has joined the credit trading team reporting to Chris Khan. Damien Michael (ex Standard Chartered & HSBC) has joined as Founding Principal, Credit Risk Manager.
- Peter Burns has been appointed as Senior Managing Director, Financial Services with Accenture. He was previously with Strategy& as PwC Global Banking & Capital Markets Leader and ASEANZ Consulting Financial Services Leader.
- UBS has appointed Rob Collins as Managing Director, AUD Derivatives, he was most recently with NAB as Head of Derivatives & Forward FX. Angus Bottrell has also joined UBS covering global equity sales, he joins from Macquarie Group. In research, Levi Spry & Lachlan Shaw have been appointed as Co-Head of Metals & Mining. Levi was most recently with JP Morgan & Lachlan with NAB.
- Max Bulloch previously Head of Trading at Deutsche Bank, has joined Westpac as Head of Credit Trading.
- Isham Nilar has joined LendLease as Senior Treasury Manager from Origin most recently in Carbon Strategy, Future Fuels team.
- Sameer Chopra Head of Australian Research with BAML, has joined CBRE as Head of APAC Research.
- David Hurley (ex Goldman Sachs) & William MacDiarmid (ex Ord Minnett) have joined Morgan Stanley. David will run hedge fund sales & William will join equity research sales.
- Darren Ryper previously with Bank of Communications as Head of Treasury & Financial Institutions, has joined MUFG Bank as Head of Liquidity Management, Oceania.
- Daniel Kang (ex Bloomberg Intelligence & Citi) has joined CLSA's equity research team, covering steel, building materials, chemical / fertiliser & packaging industries.
- Usha Creedy previously with Westpac, has joined Morgan Stanley as Analyst, DCM.
- Paul Kaner has joined Ord Minnett equities research team, covering resources. He was previously with RBCCM.

### ALTERNATIVE INVESTMENTS

#### Private Equity / Family Office / Credit / etc.

- Justin Hooley most recently Head of Credit Opportunities with Deutsche Bank is departing the firm, reportedly he will be joining Barings' private

To unsubscribe please respond to email with 'unsubscribe' in subject line.



JON  
MICHEL

SYDNEY  
Level 15  
60 Castlereagh Street  
SYDNEY NSW 2000  
Tel 61 2 9235 9400

MELBOURNE  
Level 9  
41 Exhibition Street  
MELBOURNE VIC 3000  
Tel 61 3 9653 8600

## executive search

credit team. Michael Lee has also joined the fund as Senior Associate, Global Private Credit from Westpac.

- Peter Graf who was Head of Leveraged Finance with Credit Suisse, has joined Ares Management as Managing Director, Private Debt Strategy.
- Andrew McDonnell & Michael Kurland have founded direct lending firm Arrowpoint Capital. Both Andrew & Michael were previously with Wingate.
- David O'Connor has joined Tanarra Credit Partners as Investment Director, he was previously Director, Leveraged & Acquisition Finance with ANZ.
- Brett Cohen previously with Investec as Director, Power & Infrastructure Finance, has joined Meydan Group as Head of Investments.
- Samuel Green, ex Macquarie Corporate & Asset Finance team has joined Apollo Global Management as a Principal.
- Mathew Fulton & Marc Hurwitz (both ex Investec) & Charles Tandy (ex ANZ) have joined Metrics Credit Partners as Investment Directors.
- Daniel Waine has joined Crescent Capital Partners as Director, New Investments. He was previously Associate Partner / Head of Deal Origination with Ernst & Young.
- Australian Business Growth Fund have hired Alexander Chang (from Greenhill Australia), Elliot Steel (from McKinsey & Co) and Lori Broner (from Anacacia Capital) as Investment Associates.
- Priscilla Luong has joined HPS Investment Partners as an Associate from Macquarie Group, where she was a Manager in the MIRA team.
- TPG has added UBS Associate Director, Jaclyn Ying & Morgan Stanley Analyst Alexandra Anthony to its team.
- Huei Lay previously with Wesfarmers' Strategy and M&A Group, has joined Vision Private Equity.
- Alex Wang has joined Prostar Capital as an Investment Associate from Mercer.
- Aya Hassan has joined Pemba Capital Partners as an Investment Associate, she was previously with PwC.
- Primal De Silva has joined Magellan Financial Group as Analyst, Governance & Advisory from amicaa.
- Ivan Milutinovic previously with Goldman Sachs, has joined Rest Super as Senior Analyst, Private Equity.
- Igor Neshcherov, ex Azure Capital, has joined ACTA Capital as an Investment Analyst.
- Chantal Reid & Samuel Patrick have joined ARENA as Investment Analysts. Both were previously with KPMG in Brisbane & Sydney respectively.

### FUNDS MANAGEMENT

#### **Distribution & Advice**

- Kivanch Mehmet has joined Qualitas as co-head of Institutional Capital, he was previously with Charter Hall as Head of Wholesale Investor Relations.
- Chris Inifer has been appointed as Head of Distribution with Alexander Funds Management. He has prior experience with Allan Gray, most recently as Head of Retail Distribution.
- Chris Briggs has been appointed as Managing Director, Business Development with Pacific Current Group. Chris was previously with Nikko Asset Management, most recently as Head of Institutional Sales.
- Annabelle Maitland has joined Adamantem Capital as Investor Relations Manager. Prior, Annabelle worked offshore in London with JEGI CLARITY.
- Alvina Galstian has joined Latimer Partners as a Vice President, prior she held roles with CBA and KPMG. Also joining Latimer is Brian Lau, ex Deutsche as a Senior Associate.
- Dylan Mitchell has joined First Sentier Investors as Institutional Business Development Manager from Dimensional Fund Advisors.

#### **Investments**

- Peter Chun has been appointed as CEO of UniSuper, he will commence his role in September. Peter was previously with Aware Super.
- Michelle Boucher prior Group Executive, People, Technology & Enablement with CBUS, has been appointed as Deputy CEO with First Super.
- Anna Shelley has been appointed as CIO with AMP Australia, she joins from Equisuper.
- Mark Himpoo previously with UniSuper as Senior Manager, Equities, has been appointed as Chief Commercial Officer with Jarden.
- Dane Roberts of Regal Funds Management has joined Fifth Estate Funds, a joint venture between joining Centennial Asset Management/BlueLake Partners, Dane joins as a Portfolio Manager.
- Jo Saleeba has joined the London Stock Exchange Group as Head of Sustainable Investment, Australia & New Zealand. Prior, she held roles with Hesta and the Investor Group on Climate Change.
- Andrew Thomas has joined Rest Super as Head of Investment Strategy. Prior, he held investment strategy roles with BlackRock and QBE.

To unsubscribe please respond to email with 'unsubscribe' in subject line.



JON  
MICHEL

## executive search

SYDNEY  
Level 15  
60 Castlereagh Street  
SYDNEY NSW 2000  
Tel 61 2 9235 9400

MELBOURNE  
Level 9  
41 Exhibition Street  
MELBOURNE VIC 3000  
Tel 61 3 9653 8600

- Bettina Lung previously with Investec, has joined Aware Super's Direct Lending team.
- Peiting Liang previously with JP Morgan as Equity Research Associate for Healthcare, has joined Northcape Capital as an Investment Analyst covering Australian Equities.
- Gabriel Wilson-Otto, ex BNP Paribas Asset Management, joins Fidelity as Director of Sustainable Investing.
- Hayley McGuinness has joined Citi as an ESG Research Associate, from Ernst & Young.
- Kiran Singh, ex Cbus, and Sonia Bluzmanis, ex BT Investments, have joined Rest Super as Head of Listed Assets and Head of Global Equities respectively.
- Piers Flanagan & Taylor Guyot have joined Barrenjoey Capital Partners' small caps team. Piers will join in August from CLSA and Taylor joins from PwC.
- Carlos Castillo previously with Ellerston Capital, has joined Melior Investment Management as a Senior Analyst.
- Chris Drew joins Rest Super as Head of Australian Equities. Prior, he held Investment Manager roles with Australian Catholic Superannuation and Sunsuper.
- Shawn Johnson, ex State Street Global Advisors, has joined AMP Capital as CEO.
- David Shang has joined Regal Funds Management as an Investment Analyst from JP Morgan.

### **CORPORATE, GOVERNMENT & RISK MANAGEMENT**

- Nicholas Mant has been appointed as Chief Investment Risk Officer with NAIF. He was previously with EBRD in London as Portfolio Manager, Equity Funds. Stephen Land has joined as Director, Transport. He was previously with Commonwealth Bank as Director, Infrastructure Project Finance. Stuart Blackadder has also joined as Director, Equity Investments. Stuart was previously with Prostar Capital as Managing Director.
- Kay Stuart previously Managing Director, Infrastructure with RBCCM, has been appointed as General Manager, Corporate Development & Investments with APA Group.
- Charlotte Middleton has joined ScotPac Business Finance as CRO. She has earlier experience with Xinja, Avenue & Westpac.
- Matthew Cordingley, ex Healius & RBCCM, has been appointed as CFO with Pacific Smiles Group.
- Australian Business Growth Fund has hired Rayna Toman (ex Next Capital) as CFO & COO, as well as Stefanie Allen (ex Lazard) as General Counsel.
- Judo Bank has appointed Lisa Frazier as COO (she was previously with Wells Fargo) & Angelo Manos as Chief Relationship Officer (he was previously with ANZ Bank).
- Henry Foster, ex Laser Clinics Australia & Luminis Partners, has joined PEP owned Modern Star as General Manager, M&A and Group Strategy.
- Camille Roussel has joined News Corp's business development team. She was previously with Goldman Sachs as an Investment Banking Associate.
- Glenn Poynton has joined BetaShares as Corporate Development Director. Glenn joins from Class Limited where he was Chief Strategy Officer.

**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](mailto:nfoster@jmichel.com.au)**

**The content of this document is not to be copied or reproduced without the prior consent of the Directors of JMES.**