

MARINE MONEY

15th Annual Marine Money London Ship Finance Forum

25 January 2024

JW Marriott Grosvenor House on Park Lane, London

AGENDA

IS DOING NOTHING A GOOD STRATEGY

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MORNING

08:15 **Registration and Welcome Coffee**

09:20 **Opening Remarks**

Mia Jensen, Director Greece & Events, Marine Money

Abhishek Pandey, Global Head of Transportation Finance, Standard Chartered Bank

AGENDA

- 09:30 **Global outlook 2024 – A soft landing, with risks**
The world economy should be able to achieve a soft landing after the most aggressive monetary tightening cycle in years, although risks abound. The impact will be felt differently across developed and emerging economies. But will lingering inflation (with upside risks to oil prices) and geopolitical developments threaten the global soft-landing scenario?
- Sarah Hewin, Head of Research, Europe and Americas, Standard Chartered Bank
- 09:50 **To 2030 and beyond - pathways to de-risk the energy transition**
James Frew, Business Consultancy Director, Lloyds Register
- 10:10 **Canals, wars, China and trade growth. The real shipping challenges in 2024**
Owners and operators discuss shipping disruptions and changing trade routes. How have operations been impacted and is more disruption likely in 2024.
- Moderator:* Simon Petch, Partner, Watson Farley & Williams
- Panel*
Semiramis Assimakopoulou, Senior Vice President of Sales, Signal Group
Jim Cirenza, Managing Director, DNB Markets Inc.
Tim Power, Managing Director, Drewry
Alok Kumar, Chairman, Alphard Group
Ivar Myklebust, Chair of the Board of Directors, Gram Car Carriers
- 10:45 **Demand, Deliveries, Decarbonisation, Deviation and Disruption – what will drive the markets this year and beyond ?**
Adam Kent, Managing Director, Maritime Strategies International (MSI)
- 11:05 **KEYNOTE INTERVIEW**
Martin Stopford *is known to the entire market and has given his unique view on the shipping markets for the past decades. In this session Martin looks at the challenges shipping is facing today and in the future, and comments about human or technological solutions that we can hopefully rely on.*
- Interviewed by:* Abhishek Pandey, Global Head, Transportation Finance, Standard Chartered Bank
- 11:30 **Networking Break**
- 12:00 **The US Government Zeroes in on Shipping**
Bruce G. Paulsen, Partner, Seward and Kissel LLP
- 12:20 **Do regulations and sanctions work in terms of "policing" the performance of shipping**
The world today seems to present an increasingly dangerous and complex geopolitical trading landscape for the international shipping industry. Sanctions, evolving political alliances, armed conflict and regional regulations offer opportunities and dangers that will try the safety, fortunes and reputation of the industry. What are the best practices for owners, counsel, financiers and regulators to effectively navigate the shifting patterns?
- Moderator:* Richard Fulford-Smith, Managing Director, Affinity
- Panel*
Richard Meade, Editor in Chief, Lloyd's List
Morten Arntzen, Executive Chairman, Team Tankers International
Russell Hoare, Partner-CMS Antitrust, Competition and Trade Team, CMS UK
Frank Dunne, Former Senior Partner at WFW – currently an Independent Consultant

AGENDA

- 12:55 **The billion dollar club: Initiation, coordination and execution of billion dollar debt deals**
Huge debt deals involving multiple banks and arrangers are becoming more common again. In this session shipowners who have accomplished such deals discuss the starting process, the ongoing coordination and all the way to completion.

Moderator: Gaurav Moolwaney, Managing Director, Transportation Finance, Standard Chartered Bank

Panel

Hugh Baker, Managing Director, Scorpio USA LLC.

Achilleas Tasioulas, Chief Financial Officer, GasLog Ltd. & GasLog Partners LP

- 13:25 **Lunch Break**

AFTERNOON

- 14:45 **It's the existing fleet that will make shipping meet the decarbonisation deadlines**
There is much talk about targets for 2030, 2040 and 2050. To be effective these early targets need a massive effort from the existing fleet of vessels to retrofit and to utilize carbon capture technology. New fuels and combustion systems are for later targets. Is the momentum there and are owners willing to invest to do those necessary retrofits?

Moderator: Nick Brown, Corporate Affairs Director, Marine & Offshore, Bureau Veritas

Panel

Lise Duetoft, Chief Strategy and Analytics Officer, Höegh Autoliners AS

Christian Rychly, COO, MPC Container Ships ASA

Harris Antoniou, Founder and Managing Director, Neptune Maritime Leasing Ltd.

- 15:15 **How are banks handling rising interest rates and excess market liquidity in 2024**
Mainstream commercial banks continue to finance the shipping industry but circumstances have changed in the past years. The market has excess liquidity, the global economy is sputtering and interest rates have risen substantially. What makes for a bankable shipping deal in 2024 and what are the main credit issues considered?

Moderator: Dora Mace-Kokota, Partner, Stephenson Harwood LLP

Panel

Anastassia Tcherneva, Head of Shipping Clients, ABN AMRO Bank N.V.

Vassilis Maroulis, Managing Director, Global Head of Shipping, Citi

Paul Taylor, Managing Director, Global Head of Shipping & Offshore, Societe Generale CIB

Stephen Fewster, Global Head Shipping Finance, ING Bank

Christos Tsakonas, Global Head of Shipping, DNB Bank

- 15:50 **What do shipping investors want to see in 2024**
In a somewhat directionless market there are still opportunities. A look at what shipping investors are seeking both in form of debt deals and equity transactions. Where best to place your funds and what are the main criteria being considered by investors and lenders alike. What are the differentiating factors for shipping companies and sectors in the year ahead.

Moderator: Susan Riitala, Partner, Reed Smith LLP

Panel

Mohamed Sijilmassi, Vice President, Finance, ADNOC Logistics & Services

Jake Scott, Managing Partner, Blue Ocean Partners

Alexis Atteslis, Co-Head of Europe & Partner, Oak Hill Advisors

Nicholas Petrakakos, Managing Partner - Maritime & Offshore Investment Banking, Alantra

Halvor Sveen, Chief Executive Officer, Maritime & Merchant Bank ASA

Wilhelm Magelssen, Partner & Fund Manager, NRP Maritime Asset Management

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16:25 **IS DOING NOTHING A GOOD WAY FORWARD: What is a good shipping strategy for 2024**
Shipping is a cyclical business that never stands still. Fleets must be renewed and very often the best profits are seen in sale and purchase plays. However, the current market has many owners in a quandary. To buy, to sell, to cash cow strong markets. Is doing nothing perhaps a wise move for now until there is better direction in the markets, in technology and in sentiment.

Moderator: Ege Akcasoy, Managing Director and Advisor to the Board, Newport Shipping UK LLP

Panel

Michael Parker, Chairman, Global Shipping & Logistics, Citi
Elias Sakellis, Chief Executive Officer, Australis Maritime
Anastasios Aslidis, Chief Financial Officer, Euroseas Ltd & EuroDry Ltd.
Felix Nölke, Managing Director, MPC Capital AG

Closing Remarks

Cocktail Reception *co-host: IRI / The Marshall Islands Registry*
Celebrating 200mm Gross Tons!

Upcoming events info are at <https://www.marinemoney.com/events-2-0>



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