



SHIP FINANCE & INVESTMENT

Strategies for Success in 2024

As we kick off a year of extraordinary uncertainty, Marine Money Hamburg is designed to help you find opportunities, identify risks and enjoy the pleasure of doing business with seasoned dealmakers in the amazing city of Hamburg.

Tuesday, February 27, 2024 at 6:00 pm

Pre-Conference Welcome Cocktail Reception

The Office of Ehlermann Rindfleisch Gadow

Ballindamm 26, Hamburg, 20095

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Wednesday, February 28, 2024

8:00 Registration Opens – Coffee & Refreshments

9:15 Opening Remarks / Recognition of Achim Boehme Scholars

Marine Money / Stefan Rindfleisch, Partner, Ehlermann Rindfleisch Gadow

9:20 Demand, Deliveries, Decarbonisation, Deviation and Disruption

What will drive the markets in 2024 and beyond?

Adam Kent, Managing Director, Maritime Strategies International (MSI)



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STRATEGIES & TACTICS

9:40 Shipping Investment Summit: Where Best to Deploy Capital Today

There many different strategies for investing in the global shipping industry. In this session, active market players share their views.

Frederik Baier Jensen, Chief Investment Officer, Celsius Shipping

Atef Abou Merhi, Managing Director, Pelagic Partners

Christoph Toepfer, Founder & CEO, Borealis Maritime

Andy Tuchman, Partner, Blue Ocean Partners

Moderator: Carl Rehder, Vice President Commercial – Europe, Bocomm Shipping Leasing (Europe) GmbH

10:10 The Role of Leadership in a Volatile World

Nikolaus H. Schües, President, BIMCO

Gaby Bornheim, President, German Shipowners Association (VDR)

Interviewed by: Stefan Rindfleisch, Partner, Ehlermann Rindfleisch Gadow

10:30 Mergers & Acquisitions – Cash-rich Owners Accelerating Transactions

The combination of abundant liquidity and a reluctance to order new ships has resulted in increased M&A activity – in deals ranging from vessels owners to service companies to technology providers. Get up to speed on what's been done, and what's coming next.

Chris Weyers, Managing Partner, AMA Capital Partners LLC



10:45 Keynote Address: Angeliki Frangou, Chairwoman & CEO, Navios Maritime Partners L.P.

11:05 Break

11:35 Macro Outlook: Fundamentals Versus Geopolitical Uncertainty

Dr. Andreas Rees, Chief German Economist, UniCredit Group

11:55 Captains of Industry: Robert Yildirim, President & CEO of the YILDIRIM Group

The Yildirim Group of Companies is a family-owned business and has grown to become a global force in international trade. The company operates in 56 countries across 5 continents and 9 industries with 25,000 employees worldwide.

Interviewed by: Matt McCleery, President, Marine Money

12:15 Setting Sail Together – Unveiling the Synergies of Financial Investors and Private Shipowners

Wilhelm Magelssen, Fund Manager, NRP Maritime Asset Management AS

12:25 Public Equity Markets & Shipping – Making it Work...for Everyone

In this session, a combination of market players will share their views on the current state of play of shipping companies in the public markets – and the role that public equity will play in the future.

- Who are today's investors - and what do they want?
- Social Media Strategies and Shipping Investments
- Making it work for investors and issuers
- Today's "Top Picks"
- Finding Value
- Corporate Governance

Stavros Gyftakis, CFO, Seenergy Maritime Holdings Inc.

Edward Finley-Richardson, CIO / Twitter Influencer, Contango Research

Nicholas Stillman, Founder & Portfolio Manager, Olympic Maritime Partners

Nicolas Tirogalas, CIO, Tufton Investment Management Limited

Moderator: Randi Navdal Bekkelund, Chief Financial Officer, Avance Gas

12:55 Lunch

2:10 To Strand or Not to Strand - Fossil Fuel Carriers at the Dawn of the Low-Carbon Economy

Anticipating the demand-side risk for oil carriers and liquefied gas tankers on the way to net-zero in 2050.

Stefanie Sohm, Advisor Transport and Climate, Kühne Foundation

2:20 EUAs have arrived in the Maritime World but is Everyone Prepared?

Arne Rahner, Head of Financial Markets, BERENBERG

Christian Winkler, Global Head of Commodity Sales, UniCredit Bank GmbH

Adamantios Emm. Catsambis, Commercial Manager, Eurobulk Ltd.

Dr. Thomas Hartwig, Chief Economist, Peter Döhle Schiffahrts-KG

Mirco Erdtmann, Managing Director, Hanseatic Unity Chartering (HU) GmbH & Co. KG

Moderator: Albrecht Grell, Managing Director, OceanScore GmbH

CAPITAL FOR SHIPPING

2:55 New Structured Products for Shipping

Kalash Pandey, Managing Director, Goldman Sachs

3:05 Credit Conditions for Shipping – The Art of Leverage in a Cyclical Market

Credit is the foundation of the shipping industry's balance sheet. In this session, a wide range of leading market players provide an update on current market conditions.

Jan-Philipp Rohr, Global Head of Shipping, Hamburg Commercial Bank

Jens Mahnke, CEO, EFS - Elbe Financial Solutions

Michael De Visser, Managing Director – Head of Shipping, NIBC Bank



Vikram Hiranandani, Managing Director, Scorpio Tankers

Anna Mao, Managing Director & Head of Origination Team, CMB Financial Leasing Co., Ltd.

Anastassia Tcherneva, Managing Director & Head of Shipping Clients, ABN AMRO Bank NV

Moderator: Jonathan Ward, Partner, Stephenson Harwood

3:35 In Conversation with Art Regan, CEO, Energos Infrastructure

Interviewed by: Kurt Plankl, Partner, Seward & Kissel

3:55 How to Start-Up in Offshore Wind

Kris Benne, Manager Offshore Wind, Newport Shipping GmbH / NAV

4:05 Closing Shipowner Summit: From Wind to Gas to Containers and More

In today's world of unprecedented disruption, there are opportunities and risks. In this session, a fantastic mix of public and private shipowners, operating in non-correlated sectors, share their view from the frontlines of global trade – providing invaluable market intelligence for investors and financiers.

Ted Young, CFO, Dorian LPG

Constantin Baack, CEO, MPC Container Ships

Andy Dacy, CEO, JP Morgan Asset Management Global Transportation Group

Christian Nolting, Group Treasurer, Purus

Jerry Kalogiratos, CEO, Capital Product Partners L.P.

Moderator: Douglas Mavrincac, Global Head, Maritime Investment Banking, Jefferies

4:50 Conference Ends

Closing Reception to Follow



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