



INTELLECT OXFORD

SCHOOL OF WHOLESALE BANKING

Senior Executive Programme

Agenda
21-23 May 2025



DAY 1 - WEDNESDAY, 21 MAY

NETWORKING AND CULTURAL PROGRAMME: OPTIONAL PRE-COURSE MORNING IN OXFORD

09:30 - 11:30

**Personal Time: Opportunity to explore
this stunning town**

Explore the city's beginnings as a humble Saxon town through to its current position as a world-famous seat of learning and culture. Opportunity to visit many world-class centres of learning and discovery, for example, the amazing Pitt Rivers Museum of Christ Church College, the alma mater of numerous British Prime Ministers and many outstanding University sights

11:30 - 13:00

Private guided walking tour of Oxford

Starting at the Randolph Hotel, this private, guided tour will give you an insight into the history of Oxford, especially as a centre of learning and originally religious devotion, including entry into one of the colleges. The tour will finish at the Rhodes House

COURSE PROGRAMME

13:00 - 14:00

**Lunch & Networking at
Rhodes House**

14:00 - 14:20

**Event Opening, Welcome
Introductions and Course
Objectives**

Dr. Theodore Roosevelt Malloch

Programme Director, Intellect Oxford School of Wholesale Banking, CEO, The Roosevelt Group, Former Research Professor at Yale University, Professor of Strategic Leadership and Governance, Henley Business School, Senior Fellow in Management Practice, Saïd Business School, University of Oxford

Manish Maakan

School Sponsor, Intellect Oxford School of Wholesale Banking & CEO - Wholesale Banking, Intellect Design Arena

OPENING

14:20 - 15:00

**CEO / CIB Perspective on
Wholesale Banking**

15:00 - 15:40

**Wholesale / Transaction Banking
Canvas: The Key Considerations**

Rajesh Mehta

Programme Director, Intellect Oxford School of Wholesale Banking, Strategic Advisor, Global Growth Advisory Board, Intellect, Senior Advisor, Boston Consulting Group (BCG), Former Managing Director, Treasury and Trade solutions, Citi

15:40 - 16:20

**Strategic View on Cash
Management: Themes and Trends**

Manish Kohli

Head of Global Payments
Solutions, HSBC

16:20 - 16:40

Break

16:40 - 17:20

**Key Themes in Wholesale Banking:
2025 / 2026**

Kunal Jhanji

MD, Leader for Payments and Fintech for EMEA and South America, BCG

17:20 - 18:00

**Design Thinking for
Transformation in Banking**

Arun Jain

Chairman & Managing Director, Intellect Design Arena

EVENING PROGRAM

18:00 - 19:00

**Personal time / Opportunity to
explore Oxford**

19:00 - 20:00

**Tour, Drinks and Dinner at the
Museum of Natural History**

The Museum of Natural History was established in 1860 and holds an internationally-significant collection of natural history specimens and archives in a stunning example of neo-Gothic architecture. The award-winning Museum collection includes the world's first scientifically described dinosaur.

20:00 - 22:00

**Dinner With The Dinosaurs:
Geopolitical, Economic Developments
and Business Impact**

Simon King

Director, GMTL Advisory

DAY 2 - THURSDAY, 22 MAY

MANAGE, MOVE & MAKE MONEY

09:00 - 09:15

Setting The Context

Intellect Design Arena

09:15 - 09:55

**Deposits and Liquidity Management:
Liquidity Strategies, Leveraging Data
and Balance Sheet Management**

Martijn Stoker

Managing Director, Global Head Liquidity &
Investment Solutions, HSBC

09:55 - 10:35

**Payments and Receivables:
Embedded Payments, Receivables,
Innovation and Client-centric Solutions**

Moderator: **Todd Roberts**

Senior Partner, Deloitte, Canada

10:35 - 10:45

Break

10:45 - 11:25

**Trade / Supply Chain Finance:
Driving Trade Transformation with
Collaborative Client Case**

Stephanie Betant

Managing Director, Head of Global Trade
Solutions, HSBC UK

11:25 - 12:05

**Embedded Finance:
SME International needs and
embedded finance**

John Carroll

Head of International and Transactional
Banking, Santander UK

12:05 - 13:05

Lunch & Group Photo

BUILDING SECTOR SPECIFIC ECOSYSTEMS FOR GROWTH

13:05 - 13:45

Manufacturing

Cara Savas

European Corporate Sales Head,
HSBC Global Banking and Markets

Mila Harger

HGlobal Head of Digital Treasury & Banking,
BAT

13:45 - 14:25

Energy

Darsh Johal

Head of Global Cash Management,
Shell Treasury Centre Limited

14:25 - 14:40

Break

14:40 - 15:20

**Wholesale Banking: Industry Sector
Trends - Intellect view**

Deepa Santhanam

SVP & Global Head, Domain Consulting,
Intellect Design Arena

DAY WRAP UP

15:20 - 15:40

Intellect Design Arena

15:40 - 16:25

Exploring the Bodleian Library

The Bodleian Library is one of the oldest libraries in Europe, and in Britain is second in size only to the British Library. It holds over 13 million printed items including outstanding special collections of rare books and manuscripts, classical papyri, maps, music, art and printed ephemera.

16:25 - 19:25

**Personal time / Opportunity to
explore Oxford**

EVENING PROGRAM

20:00 - 22:00

Ashmolean Museum Tour and Dinner

Dinner at the Ashmolean Museum

The Ashmolean is the University of Oxford's museum of art and archaeology, founded in 1683. Our world famous collections range from Egyptian mummies to contemporary art, telling human stories across cultures and across time

20:00 - 20:30

Future of Finance

Pinar Ozcan

Professor of Entrepreneurship and
Innovation, University of Oxford & Director,
Oxford Fintech Initiative

DAY 3 - FRIDAY, 23 MAY

PLAYBOOK FOR WHOLESALE BANKING TRANSFORMATION

09:00 - 09:15

Setting The Context

Intellect Design Arena

09:15 - 10:00

**Banking Transformation:
Market perspective**

Christian Sarafidis

Chief Executive EMEA Financial Services,
Microsoft

10:00 - 10:45

**Playbook for Banking
Transformation: A Transaction
Banking Head's Perspective**

Jennifer Doherty

Managing Director, Head of Business
Enablement & Change, Transaction Banking,
Standard Chartered Bank

10:45 - 11:30

**Playbook for Banking
Transformation: A CIO's Perspective**

Lucose Eralil

COO, Security bank

11:30 - 12:00

Break

12:00 - 12:40

CIO Panel

Moderator: **Dave Revell**

Strategic Advisor, Global Growth Advisory Board,
Intellect, former CIO, CIBC & Bank of Montreal

12:40 - 13:10

Reflections: My Takeaways

13:10 - 13:25

Closing Address

Dr. Theodore Roosevelt Malloch

Programme Director, Intellect Oxford
School of Wholesale Banking,

13:25 - 14:00

Lunch

14:00 - 16:00

Depart to London by Luxury
Executive Coach

16:00 - 17:00

Arrive at The Cavendish Hotel,
Mayfair, London & Check-in

GRAND GRADUATION CEREMONY AND DINNER

18:00 - 20:00

Cocktail Reception,
Certificate Presentation,
Photographs & Networking

**Graduation Ceremony at the
Oxford and Cambridge Club**

The Clubhouse is a Grade II* listed building, and was designed for the Oxford and Cambridge University Club by Sir Robert Smirke (best known for the British Museum). It opened to members in 1838. The facade is an important example of the Greek revival style. In 1952 the Club extended its premises to incorporate the neighbouring house, 77 Pall Mall, formerly the home of Princess Marie Louise, a granddaughter of Queen Victoria

20:00 - 22:00

Dinner

20:00 - 20:30

Oxford Closing Speaker

Ann Cairns

Board Member, London Business School,
former Executive Vice Chair, Mastercard

DAY 4 - SATURDAY, 24 MAY

07:30 - 11:00

Breakfast

11:00

Latest Checkout

INTELLECT OXFORD
✦
SCHOOL OF WHOLESALE BANKING

www.intellectoxford.com