

IDC UPDATE

June 13, 2023

IDC Update: June 8, 2023

Register Today: IDC Chapter Meetings in San Francisco, Los Angeles, and Washington, DC

IDC will host its next San Francisco Chapter Meeting on **Tuesday, June 13** at Dodge & Cox's office. The meeting will feature a discussion, led by Rob Turley, Dodge & Cox Vice President and Portfolio Strategy Analyst, on investment risk management. The meeting will also feature an informal discussion for participants on topics of current interest in the boardroom. IDC Chapter meetings are open to independent and interested directors of ICI member funds. Please register [HERE](#).

In addition, registration is now open for IDC's Chapter Meetings in [Los Angeles](#) on **Thursday, June 15** and in [Washington, DC](#) on **Monday, June 26** at IDC's office.

Register Now for IDC Industry Segment Calls

IDC will host its next call for [Directors of Business Development Companies \(BDCs\)](#) on **Monday, June 12** at 2:00 p.m. (ET). This call will be an informal and interactive discussion among participants, facilitated by Susan McGee, Independent Director of Goldman Sachs BDC, and will feature an update on the state of the private credit markets and the impact on credit valuation and deal flow, led by Frank Gaetano (Partner, Financial Markets & Real Estate, PwC) and Patricia Luscombe (Managing Director and Global Co-Head of the Valuations & Opinions Group, Lincoln International). The call is closed to regulators and the media.

IDC will host its next calls for [Governance Committee Chairs](#) on **Wednesday, June 21**, [Board Leaders](#) on **Thursday, June 22**, and [Directors of ETFs](#) on **Wednesday, July 12**. The [New Directors Engagement Call](#) is on **Tuesday, June 27**. These calls are open only to directors of ICI member funds and are closed to regulators and the media.

Registration Open for IDC Webinar on New and Proposed SEC Fund Disclosure Requirements: What Boards Need to Know

As the SEC continues its rulemaking activity at a record pace, join IDC on **Wednesday, July 12** at 12:00 p.m. (ET) for an overview of final and proposed rules implicating fund disclosure requirements. Coleen Downs Dineen (Independent Director, Artisan Funds) will moderate an informative discussion with David Bartels (Partner, Dechert) and Erica Evans (Assistant General Counsel, ICI). The panelists will review new SEC rules on tailored shareholder reports and proxy voting disclosure, as well as the SEC's rule proposals on the Names Rule and ESG disclosure requirements, among others. Directors will receive practical guidance to assist them in their oversight role. Please register [HERE](#).

ICI Announces 2022 Diversity and Inclusion Survey Results

ICI has [announced](#) the results of its biennial [2022 ICI US Asset Management Diversity & Inclusion Survey](#), providing insight into the diversity of the asset management industry. The 2022 survey gathered information on workforce demographics, asking ICI members to provide responses using industry-specific job classifications for the first time as well as measures available to members in considering workforce diversity and inclusion issues in the industry. According to the survey, representation from historically underserved or underrepresented communities in the industry increased from 30.5 percent in 2020 to 34.4 percent in 2022. The percentage of women represented in the industry declined from 41.8 percent in 2020 to 39.7 percent in 2022.

ICI Releases 2023 Investment Company Fact Book

ICI recently released the 63rd edition of its seminal Investment Company Fact Book (Fact Book). The Fact Book [contains](#) a comprehensive summary of ICI's research and analysis on trends and activities in the investment company industry. A PDF of the Fact Book and the accompanying data files are available [here](#).

Mark Your Calendar for Upcoming Events

All times are shown in eastern time (ET), unless otherwise noted.

Conference

- Fund Directors Conference, October 11-13 (Chicago)

Webinar

- [New and Proposed SEC Fund Disclosure Requirements: What Boards Need to Know, July 12, 12:00 p.m.](#)

Industry Segment Calls

- [Directors of BDCs, June 12, 2:00 p.m.](#)
- [Governance Committee Chairs, June 21, 1:00 p.m.](#)
- [Board Leaders, June 22, 3:00 p.m.](#)
- [New Directors Engagement Call, June 27, 2:00 p.m.](#)
- [Directors of ETFs, July 12, 2:00 p.m.](#)

Chapter Meetings

- [San Francisco, June 13, 10:00 a.m. \(PT\)](#)
- [Los Angeles, June 15, 10:00 a.m. \(PT\)](#)
- [Washington, DC, June 26, 10:00 a.m.](#)

A list of IDC events can be found on IDC's website. Please contact [Paul Mussoni](#) for additional information.

In Case You Missed Recent IDC Webinars or IDC Update Editions

Be sure to check out our recent webinars available on-demand.

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