

# SMM 2019

## London Metals Seminar

Join SMM's metals seminar during LME London week, on Tuesday afternoon, October 29, 2019.

This event features global industry leaders, who still explore and engage in a range of topics including the evolution of copper, nickel, battery market, EV metal supply, and the outlook of metals amid the friction in geopolitics and trade protectionism.

**Time:** October 29, 2019 (Tuesday)

**Address:** The National Gallery, Trafalgar Square, London, WC2N 5DN



## Agenda

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- 12:40-13:20 Registration
- 13:20-14:00 When the disconnect between ferrous and nonferrous prizes to reverse?  
Ian Roper, General Manager, SMM Singapore
- 14:00-14:40 Redrawing the Global Map – US Metals and Minerals policy  
Andy Home, Senior Metals Columnist, Thomson Reuters
- 14:40-14:55 China's new EV policy supportive by long-term fundamentals but challenging in the short-term  
Lu Hong, New Energy Analyst
- 14:55-15:10 What's the key driver of nickel prices in the year ahead, NPI, Stainless or Batteries?  
Yuqiao Liu, Nickel Analyst, SMM
- 15:10-16:00 Panel Discussion: Can Chinese demand countercyclicality once again save metal prices?
- 16:00-16:30 Networking Reception



**Ian David Roper**

General Manager  
SMM Singapore

Ian Roper joined SMM ([www.metal.com](http://www.metal.com)) in late 2017 to drive their international expansion and help bring their deep understanding of Chinese metals markets to a wider audience. Ian is a highly regarded industry analyst, with over 18 years experience in metals, starting at CRU in London. Since 2003 Ian was based in Shanghai, China initially with Steel Business Briefing and then Macquarie, before a five year stint at Rio Tinto running their iron ore analysis. Over 2010-2017 Ian worked as a sell-side analyst with CLSA and Macquarie based in Shanghai and Singapore.



**Andy Home**

Senior Metals Columnist  
Thomson Reuters

Andy Home has been writing about the metal markets and other commodity sectors since 1987. He started at Metals Week, progressing to Knight-Ridder Financial and then to Bridge over the course of the 1990s. In 2002 he co-founded Metals Insider, which was acquired by Thomson Reuters in 2008. Since then he has been a regular Reuters columnist, writing across the industrial metals spectrum.

He is the author of "Siberian Dreams", published in 2007, a book about the Russian mining city of Norilsk. The journey also featured on BBC Radio 4 and was the subject of a lecture at the Royal Geographical Society in London.



**Lu Hong**

Senior Cobalt and Lithium Analyst  
SMM Shanghai

Ms. Hong Lu graduated from the University of Edinburgh and is currently a senior analyst in the cobalt lithium industry of SMM, tracking the market dynamics of industrial chain, doing research related to the supply and demand relationship in the spot market, summarizing and forecasting the future market trend. She visits downstream TOP battery factories and automobile plants frequently. And she maintains good relationship with the upstreams, such as Huayou Cobalt, Greentech Group, Jinchuan Group, Havosau New Energy, and Hunan Shanshan, and has provided customized consulting projects services for international enterprises.



**Yuqiao Liu**

Senior Nickel Analyst  
SMM Shanghai

Yuqiao Liu has been focusing on nickel industry chain research, covering nickel ore, refined nickel, NPI, stainless and nickel sulfate, and keep closely contact with the industry enterprises (mines, smelters, processing plants, terminals, traders, investment banks, funds, investment companies, etc.) and regularly participated in investigation and research of operation rate, cost, nickel PMI and lead many consulting projects to serve the industry giants globally.

To register to attend, please send the information below to [service.en@smm.cn](mailto:service.en@smm.cn) and our marketing team will send you a confirmation letter shortly.

We look forward to seeing you there!