

# DELIVERING ALPHA



Institutional Investor

## DELIVERING ALPHA

Thursday • September 19, 2019

7:30–8:30 a.m.

### **REGISTRATION, BREAKFAST AND NETWORKING**

*Breakfast sponsored by: Hospital for Special Surgery*

8:30–8:35 a.m.

### **WELCOME REMARKS**

*Master of Ceremonies: Tyler Mathisen, Co-Author, "Power Lunch" and Vice President, Events Strategy, CNBC*

- Diane E. Alfano, *Chairman and Chief Executive Officer, Institutional Investor*
- Satpal Brainch, *President, Business News Worldwide, CNBC*

8:35–9:05 a.m.

### **THE CHAIRMAN**

*Jay Clayton, Chairman, United States Securities and Exchange Commission*

*Moderated by: Andrew Ross Sorkin, Co-Author, "Squawk Box," CNBC*

9:05–9:35 a.m.

### **WHERE IN THE WORLD IS ALPHA?**

Escalating trade wars and plunging interest rates have jolted markets and sent the ever-elusive alpha deeper into hiding. So where are the leading global investors looking for opportunities? Which strategies have enough upside to justify their risk profile? These investors, overseeing some of the world's most important pools of capital, will dive into delivering alpha.

*Panelists:*

- Mary Callahan Erdoes, *Chief Executive Officer, J.P. Morgan Asset & Wealth Management*
- Luke Ellis, *Chief Executive Officer, Man Group*
- Bruce Richards, *Co-Managing Partner and Chief Executive Officer, Marathon Asset Management*
- Emmanuel Roman, *Chief Executive Officer and Managing Director, PIMCO*

*Moderated by: Sara Eisen, Co-Author, "Squawk on the Street," and Co-Author, "Closing Bell," CNBC*

9:35–10:05 a.m.

### **BEYOND FAANG, WHERE ARE TECH'S TOP OPPORTUNITIES?**

With this acronym trade underperforming and under fire, many investors are re-thinking their tech investments. Which of those names remain worthy? What other tech names present alpha opportunities?

*Panelists:*

- Glen Kacher, *Chief Investment Officer and Founder, Light Street Capital*
- Scott Kupor, *Managing Partner, Andreessen Horowitz*
- Ashbel Williams, *Executive Director and Chief Investment Officer, Florida State Board of Administration*

*Moderated by: Scott Wapner, Host, "Fast Money Halftime Report," CNBC*

10:05–10:35 a.m.

### **COFFEE BREAK**

10:35–11:05 a.m.

### ACTIVE ALPHA

With a stock that's soaring, the CEO at P&G and the activist-turned-board member have formed a profitable partnership that has delivered alpha for investors. Should shareholders fear a turn of the Tide, that the rally may Crest? We'll dive into what's working at the consumer products giant and explore how they proceed from here.

*Panelists:*

- Nelson Peltz, *Chief Executive Officer and Founding Partner, Trian Fund Management, L.P.*
- David Taylor, *Chairman of the Board, President and Chief Executive Officer, Procter & Gamble*

*Moderated by:* Jim Cramer, *Host, "Mad Money w/Jim Cramer" and Co-Anchor, "Squawk on the Street," CNBC*

11:05–11:35 a.m.

### THE LONG AND SHORT OF IT: A CONVERSATION WITH STOCK PICKERS

The demise of stock picking has been long forecast. But these veterans continue to seek alpha by finding opportunities in individual names, long or short. We'll talk active strategy in this passive world and get some fresh ideas.

*Panelists:*

- James Chanos, *Founder and Managing Partner, Kynikos Associates LP*
- Leon Cooperman, *Chairman and Chief Executive Officer, Omega Advisors, Inc.*

*Moderated by:* Scott Wapner, *Host, "Fast Money Halftime Report," CNBC*

11:35–12:10 p.m.

### THE AMERICAN ECONOMIC AGENDA

The Honorable Michael R. Pence, *48th and Current Vice President of the United States*

*Moderated by:* Joe Kernan, *Co-Anchor, "Squawk Box," CNBC*

12:10–2:00 p.m.

### LUNCH AND KEYNOTE SPEAKER: ALPHA EXCELLENCE

Stephen A. Schwarzman, *Chairman, Chief Executive Officer and Co-Founder, Blackstone;*  
*Author of "What it Takes: Lessons in the Pursuit of Excellence"*

*Moderated by:* Becky Quick, *Co-Anchor, "Squawk Box" and Anchor, "On the Money," CNBC*

2:00–2:30 p.m.

### ALPHA DATA

Navigating the data deluge. Investors are no strangers to the proliferation of big data. Utilizing data scraping, drones, AI and more, firms are relying on all sorts of data to get that alpha edge. Our panel tackles the latest trends, strategies and opportunities.

*Panelists:*

- Matthew Granade, *Managing Director and Chief Market Intelligence Officer, Point72 Asset Management*
- Dr. Ulrike Hoffmann-Burchardi, *Senior Portfolio Manager, Tudor Investment Corporation*
- Michael Recce, *Managing Director and Chief Data Scientist, Neuberger Berman*

*Moderated by:* Melissa Lee, *Host, "Fast Money" and "Options Action," CNBC*

2:30–2:40 p.m.

### DELIVERING DIVERSITY

*Commentary:* Maeve DuVally, *Managing Director, Corporate Communications, Goldman Sachs*

2:40–3:10 p.m.

### THE ALPHA OF ESG

How to do good by investing well: the intersection of outperformance and impact.

*Panelists:*

- Afsaneh Mashayekhi Beschloss, *Founder and Chief Executive Officer, The Rock Creek Group*
- Clifton S. Robbins, *Founder and Chief Executive Officer, Blue Harbour Group, L.P.*
- Dr. Rajiv Shah, *President, The Rockefeller Foundation*

*Moderated by:* Leslie Picker, *Reporter, CNBC*

3:10–3:25 p.m.

### **MIND OVER MONEY**

Oz Perlman, *Mentalist and Magician*

3:25–3:55 p.m.

### **COFFEE BREAK**

3:55–4:25 p.m.

### **HIGH INTEREST**

Global uncertainty, plunging/negative interest rates, the Fed under fire, trade wars – what’s a yield hunter to do? What’s the outlook for credit investors and where are the opportunities now?

*Panelists:*

- Michael Arougheti, *Co-Founder, Chief Executive Officer, President and Director, Ares Management Corp.*
- Sarah Bloom Raskin, *Rubenstein Fellow, Duke University; Former Deputy Secretary, United States Department of the Treasury (2014-17); Former Governor, Federal Reserve Board (2010-14)*
- David C. Villa, *Executive Director and Chief Investment Officer, State of Wisconsin Investment Board*

*Moderated by: Steve Liesman, Senior Economics Reporter, CNBC*

4:25–5:00 p.m.

### **THE APOLLO MISSION**

The co-founder of the \$300 billion asset manager discusses alternative investing in a changing world.

Joshua Harris, *Co-Founder and Senior Managing Director, Apollo Global Management*

*Moderated by: Leslie Picker, Reporter, CNBC*

5:00 p.m.

### **COCKTAIL RECEPTION**

*Cocktail reception sponsored by: Kaulig Companies*