

Getting Real

Real investors sharing real challenges, ideas and solutions

September 19, 2024

The Ritz-Carlton
100 Carondelet Plaza
Clayton, MO 63105

AGENDA

8:00 – 8:30 am **Registration/Continental Breakfast** (*The Ritz-Carlton Ballroom & Foyer*)

8:30 – 8:45 am **Welcome & Opening Remarks**

- David Eichhorn, CFA®, Chief Executive Officer and Head of Investment Strategies – NISA
- Don Cobin, CFA®, Chief Executive Officer – Kennedy Capital Management

Section I: Market Outlook, Forecasting Returns, Asset Allocation Decisions

8:45 – 9:30 am **Market Outlook**

- Jan Hatzius, Chief Economist and Head of Global Investment Research – Goldman Sachs

9:30 – 10:00 am **Building Capital Market Assumptions**

This session will tie current economic themes into how investors can build consistent return expectations across asset classes and strategies. This session will delve into the premia driving returns of asset classes and approaches to estimation.

- Dan Scholz, CFA®, Director, Investment Strategies – NISA

10:00 – 10:45 am **Consultant Roundtable**

Building off the previous two sessions, the roundtable will explore how return expectations and investor objectives are incorporated into client asset allocations.

- Mark Brubaker, CFA®, Managing Director – Verus
- KC Connors, CFA®, CAIA, Partner, Chief Consulting Officer – NEPC, LLC
- Jay Love, CFA®, US Chief Investment Strategist – Mercer Investments
- *Moderator:* Cheryl Hanson, CPA, Managing Director, Client Services – NISA

10:45 – 11:00 am **Break**

Section II: Fixed Income and Equity Spotlights

11:00 – 11:30 am **Outlook on Global vs. U.S. Equities**

Strategic partners, Kennedy Capital Management and Azimut Investments provide insight into the changing financial markets and coalesce around their outlooks on global and U.S. equities.

- Giovanni Errico, Chief Executive Officer – Azimut Investments
- Frank Latuda, Jr., CFA®, Chief Investment Officer – Kennedy Capital Management
- *Moderator:* Don Cobin, CFA®, Chief Executive Officer – Kennedy Capital Management

11:30 – 12:00 pm **Active Portfolio Management: An Evaluation**

In this session, we will discuss when portfolio active management has a greater likelihood of success, how to approach manager diversification, and how to remove beta from manager alpha.

- Rick Ratkowski, CFA®, Director, Investment Strategies – NISA

12:00 – 1:15 pm **LUNCH - On Fire and In Awe**
At one time he was expected to die, but now is teaching others how to truly live.

Inspirational Speaker

John O’Leary – Two-Time #1 National Bestselling Author, Speaker and St. Louisan

In 1987, John O’Leary was a curious nine-year-old boy. Playing with fire and gasoline, John created a massive explosion in his home and was burned on 100% of his body. He was given less than a 1% chance to live. His amazing journey of survival illustrates the incredible power of the human spirit and has inspired the film adaptation of his book, On Fire.

Section III: Asset Allocator Topics

1:15 – 1:45 pm **CIO Spotlight**
CIO fireside chat covering philosophy, approach and governance of an asset allocation.

- Harshal Chaudhari, President and Chief Investment Officer – GE Investment Management Corp.
- *Interviewer:* David Eichhorn, CFA®, Chief Executive Officer and Head of Investment Strategies – NISA

1:45 – 2:30 pm **Allocator Roundtable**
Senior-level asset allocators share industry experience, investment initiatives and current market outlook.

- Jennifer Johnson, Investment Manager – Missouri Department of Transportation & Missouri State Highway Patrol Employees’ Retirement System
- Bryan Lewis, Chief Investment Officer – United States Steel Corporation
- Erin Rohde, Chief Investment Officer, Benefit Plans – Ford Motor Company
- Erol Sonderegger, CFA®, CAIA, Deputy Chief Investment Officer – Minnesota State Board of Investment
- *Moderator:* Chuck Bryant, Director, Consultant Relations and Institutional Sales – Kennedy Capital Management

2:30 – 3:15 pm **Artificial Intelligence (AI) Onslaught**
From revolutionizing industries to shaping everyday experiences, AI is at the forefront of driving change, presenting both unprecedented opportunities and complex challenges. Industry specialists discuss the cutting-edge developments and transformative potential of AI.

- Anshul Chaturvedi, Managing Director – World Wide Technology
- Anthony Habayeb, Co-Founder & CEO – Monitaur
- Carl Ledbetter, Chief Executive Officer & Chief Technology Officer – SimpleRose
- *Moderator:* Alex Mosman, CFA®, Portfolio Manager – Kennedy Capital Management

3:15 – 3:30 pm **Break**

Section IV: Non-Traditional Markets

3:30 – 4:00 pm **Biotechnology and Investing: Navigating the Next Frontier**
Advancements in science and technology are accelerating at an extraordinary pace, creating opportunities (and risks) for investors. Representatives of the investment and biotech community share insights into this complex landscape.

- Ryan Dunnegan, CPA, Portfolio Manager – Kennedy Capital Management
- Anna Damato, Ph.D., Research Analyst – Kennedy Capital Management

4:00 – 4:30 pm **The Swiss Army Knife of Investing: Using Derivative Strategies to Meet Strategic Objectives**
As investors seek to manage asset allocation, reduce unintended risk exposures, increase portfolio returns and manage liquidity, nimble structures are needed to meet everchanging portfolio objectives. Derivative-focused strategies may assist in achieving objectives using new and creative approaches.

- Jonathan Glidden, CFA®, Managing Director, Pensions (Chief Investment Officer) – Delta Air Lines
- Syed Haque, CFA®, Chief Investment Officer – Novant Health
- Carl Lantz, CFA®, Senior Portfolio Manager – Pennsylvania Public School Employees’ Retirement System
- *Moderator:* Ann-Marie Gehring, CFA®, Director, Client Services – NISA

4:30 – 5:10 pm

Private Markets Roundtable

Market participants will discuss different approaches to investing in the private market addressing investment opportunities, rebalancing considerations, valuations, liquidity and the role for co-investment.

- Craig Husting, CFA®, Chief Investment Officer – Public School and Education Employee Retirement Systems of Missouri
- Andrew Seamons, CFA®, Chief Investment Officer – HF Capital
- Michael Shedosky, CAIA, Co-Chief Investment Officer – Azimut Alternative Capital Partners
- *Moderator:* Joe Nugent, Director of Private Markets – Asset Consulting Group

5:10 – 5:15 pm

Closing Remarks

- David Eichhorn, CFA®, Chief Executive Officer and Head of Investment Strategies – NISA
- Don Cobin, CFA®, Chief Executive Officer – Kennedy Capital Management

5:15 pm

Cocktail Reception (*The Solarium*)

OFF-SITE CONFERENCE ACTIVITIES

Wednesday, September 18, 2024: Afternoon Golf Outing

11:30 am

Lunch - Forest Park Golf Course

6141 Lagoon Dr., St. Louis, MO 63112

12:30 pm

Shotgun Start

Wednesday, September 18, 2024: Cocktails/Dinner/NISA New Office Open House

6:00 pm

Saint Louis Club/NISA

7676 Forsyth Blvd., Suite 300, St. Louis, MO 63105

7:45 pm

Keynote – Advancing Inclusive Economic Growth

Like most metropolitan areas, St. Louis faces both opportunities and challenges regarding economic development. The mission of Greater St. Louis, Inc. is to bring St. Louis' business community together with a unified voice behind a bold agenda to drive inclusive economic development and get the St. Louis metro growing again.

- Jason Hall, Chief Executive Officer – Greater St. Louis, Inc.

Please continue to check the event page for agenda updates and information.
Contact your Client Services representative for assistance/questions.

Agenda updated as of 9/12/2024.

