

## Agenda

### Monday, 23 October

- 11:30 pm - 1:00 pm Arrivals and Lunch
- 11:45 am - 12:15 pm Trade Floor Tour (optional)
- 12:30 pm - 1:00 pm Trade Floor Tour (optional)
- 1:00 pm - 3:30 pm **Bond Boot Camp** (optional) Jerry Tsai
- 4:00 pm - 6:00 pm **Welcome Reception** Vea Newport Beach Hotel, Marea Terrace

### Tuesday, 24 October

- 8:00 am - 8:30 am Breakfast
- 8:30 am - 9:00 am **Welcome and Introductions**  
Lucas Fritz, Erika Lowe, Devin Arcoleo, Nikhil Sharma
- 9:00 am - 9:45 am **The Role of Fixed Income** Mike Cudzil, Matt Clark
- 9:45 am - 11:15 am **Portfolio Management Simulation Session 1**
- 11:15 am - 11:30 am Break
- 11:30 am - 12:15 pm **The Advantages of Active Liquidity Management** Jerome Schneider
- 12:15 pm - 1:45 pm Lunch
- 1:00 pm - 1:45 pm **Lunchtime Session** (optional): **Investing Today, for Tomorrow: Driving a Culture of Inclusion & Diversity** Sabrin Chowdhury
- 1:15 pm - 1:45 pm Trade Floor Tour (optional)
- 1:45 pm - 2:30 pm **A View from Washington** Libby Cantrill
- 2:30 pm - 3:15 pm **De-Mystifying Derivatives** Jerry Woytash
- 3:15 pm - 3:30 pm Break

3:30 pm - 4:15 pm **Specialty Finance: The Next Frontier in Private Credit**  
Jason Steiner, Connor McFarland

4:15 pm - 5:15 pm **Portfolio Management Simulation Session 2**

5:15 pm - 7:15 pm **Evening Reception** PIMCO

### **Wednesday, 25 October**

8:00 am - 8:30 am Breakfast

8:30 am - 9:15 am **Three Value Themes Today** Sean Klein

9:15 am – 10:00 am **Emerging Markets: Opportunities and Risks in the Current Environment**  
Javier Romo

10:00 am – 10:15 am Break

10:15 am - 11:00 am **Credit Market Outlook** Mark Kiesel

11:00 am - 12:00 pm **Portfolio Management Simulation Session 3**

12:00 pm - 1:30 pm Lunch

12:45 pm - 1:30 pm **Lunchtime Session (optional): Recent Market Volatility: Friend or Foe for Pensions?** Vijendra Nambiar

1:00 pm - 1:30 pm Trade Floor Tour (optional)

1:30 pm - 2:15 pm **Panel Discussion: Credit Investing from the Bottom Up**  
Jelle Brons, Del Anderson

2:15 pm - 3:00 pm **Opportunities in Today's Mortgage Market** Dan Hyman

3:00 pm - 3:15 pm Break

3:15 pm - 4:15 pm **Portfolio Management Simulation Session 4**

4:15 pm - 4:45 pm Transport to Dinner

4:45 pm - 7:45 pm **Dinner** The Deck on Laguna Beach

**Thursday, 26 October**

8:00 am - 8:30 am	Breakfast
8:30 am - 9:15 am	<b>Multi-Asset Portfolio Construction</b> Emmanuel Sharef
9:15 am - 10:00 am	<b>Outlook for Inflation and Commodities</b> Greg Sharenow
10:00 am - 10:15 am	Break
10:15 am - 11:00 am	<b>Exploring the Basics of Commercial Real Estate</b> John Lee, Carrie Peterson-Brown
11:00 am - 12:00 pm	<b>Portfolio Management Simulation Session 5</b>
12:00 pm - 1:30 pm	Lunch
12:45 pm - 1:30 pm	<b>Lunchtime Session (optional): Trends in Defined Contribution</b> Steve Ferber
1:00 pm - 1:30 pm	Trade Floor Tour (optional)
1:30 pm - 2:15 pm	<b>Quant Through a Fixed Income Lens</b> Nick Granger
2:15 pm - 3:00 pm	<b>PIMCO Outlook</b> Marc Seidner
3:00 pm - 3:15 pm	<b>Break</b>
3:15 pm - 4:15 pm	<b>Portfolio Management Simulation Session 6</b>
4:15 pm - 4:45 pm	Transport to Dinner
4:45 pm - 7:45 pm	<b>Awards Dinner</b> Louie's by the Bay