

ETFs IN DEPTH

INNOVATION, APPLICATION, EXECUTION

Bloomberg

ETFs IN DEPTH: INNOVATION, APPLICATION, EXECUTION

Thursday | December 1, 2016 | 1:00 PM – 6:00 PM

Bloomberg L.P.
731 Lexington Avenue
New York, NY 10022

AGENDA

1:00 PM **REGISTRATION**

1:15 PM **EVERYTHING YOU NEED TO KNOW ABOUT ETFs RIGHT NOW**

Eric Balchunas – Senior ETF Analyst, Bloomberg Intelligence

1:30 PM **OPENING KEYNOTE Q&A**

Mark Wiedman – Global Head of iShares and Index Investments, BlackRock

Moderator: Tom Keene – Editor-at-Large, Bloomberg News & Host of Bloomberg Surveillance

2:00 PM **ETFs vs. THE WORLD**

The ETF industry is a 3 trillion dollar industry and some say it could get as large as 10 trillion in the next five years. Their asset growth - and volume - is at the expense of everything from mutual funds to derivatives to single securities. ETFs are also part of a wholesale shift from active to passive. This panel will discuss what exactly ETFs are competing against and how they may not be as "passive" as they seem.

Robert Deutsch – Managing Director, Head - ETF Business, J.P. Morgan Asset Management

Wesley R. Gray, Ph.D. – Chief Executive Officer, Alpha Architect

Barry Ritholtz – Chairman & Chief Investment Officer, Ritholtz Wealth Management

Jim Rowley, CFA – Senior Investment Strategist, Vanguard Investment Strategy Group

Moderator: Julie Hyman – Senior Markets Correspondent, Bloomberg TV

2:45 PM **FIXED INCOME UPDATE: BLOOMBERG PORTFOLIO & RISK AND INDEX ENHANCEMENTS**

Update of Portfolio & Risk Analytics and Index capabilities with the recent Barclays Risk Analytics & Index Solutions (BRAIS) acquisition.

Lea Carty, Ph.D. – Head of Investor Analytics, Bloomberg L.P.

3:00 PM **ETFs & THE INVESTMENT PROCESS – AN INSTITUTIONAL PERSPECTIVE**

A panel of asset managers, liquidity providers and dealers will discuss insights on leveraging ETFs for managers searching for additional liquidity and the ability to have Fixed Income ETFs created in baskets as one solution.

Bill Ahmuty – Head of SPDR ETF Fixed Income Group, State Street Global Advisors

Robert G. Smith III, CIMC, AIF – President & Chief Investment Officer, Sage Advisory Services

Kathryn Sweeney – Global ETF Product Manager - Securities Division, Goldman Sachs

Amit Vazirani – Vice President - Fixed Income Trader, Sentinel Asset Management

Moderator: Dave Mullen – Fixed Income ETF Business Manager, Bloomberg L.P.



ETFs IN DEPTH

INNOVATION, APPLICATION, EXECUTION

Bloomberg

3:45 PM **BREAK**

4:00 PM **BLOOMBERG WORKFLOW FOR ETFs**

Update on Bloomberg's suite of ETF tools to help investors with due diligence, fund flows, research, news and trading capabilities.

Bryan Green – ETF Market Specialist, Bloomberg L.P.

4:15 PM **INVESTMENT OUTLOOK FOR ETFs: THE YEAR AHEAD**

Where should you invest now? What ETFs should you use? How do you prepare for a rising rate environment? A panel of economists and ETF strategists will discuss the election, investment landscape of 2017, themes in the market, regulation and what will be driving growth in the industry and beyond next year.

Lee Kranefuss – Co-Chairman & Co-Founder, 55 Capital Partners

Cory Laing – Head of ETF and Institutional One-Delta Sales, Citadel LLC

Heidi Richardson, CPM – Managing Director, Head of U.S. Investment Strategy for iShares, BlackRock

Jeremy Schwartz, CFA – Director of Research, WisdomTree Asset Management

Moderator: Lisa Abramowicz, co-host & columnist, Bloomberg Markets & Bloomberg Gadfly

5:00 PM **FIRESIDE CHAT WITH KEVIN O'LEARY**

Kevin O'Leary – Chairman, O'Shares Investments

Moderator: Scarlet Fu, Anchor, Bloomberg TV

5:30 PM **NETWORKING RECEPTION**