

# CAYMAN ALTERNATIVE INVESTMENT SUMMIT

FEBRUARY 8-9 2018

# WIRED

The rise of alternative  
investments in  
a digital age

## AGENDA

**DART**

**KPMG**

**MOURANT  
OZANNES**



harmonic

 Conyers  
Dill & Pearman



**Wealth Management**  
Dominion Securities

 **SWP**  
Strategic Wealth Preservation  
— Cayman Islands —

“Computers are incredibly fast, accurate and stupid. Humans are incredibly slow, inaccurate and brilliant. Together they are powerful beyond imagination.”

[CAYMANSUMMIT.COM](http://CAYMANSUMMIT.COM)

**DAY  
1**

**FEBRUARY 8, 2018  
ANCHORING INTO THE DIGITAL FUTURE**

**☕ 07:00 – 08:15**

**BREAKFAST AND NETWORKING**

**08:20 – 08:30**

**INTRODUCTION BY DART ENTERPRISES**

**Chris Duggan**, Director of the Kenneth B. Dart Foundation & Vice President, Dart Enterprises Ltd.

**08:30 – 08:40**

**ADDRESS FROM THE PREMIER  
OF THE CAYMAN ISLANDS**

**Hon. Alden McLaughlin**

**08:40 – 09:10**

**CHAIRMAN'S WELCOME AND  
OPENING ADDRESS**

**Anthony Cowell**, Partner, Head of Asset Management, KPMG

**09:10 – 09:35**

**ALTERNATIVE INVESTMENTS:  
PREDICTIONS FOR A DIGITAL AGE**

**Mark Yusko**, CEO and CIO, Morgan Creek Capital Management, LLC

**09:35 – 10:00**

**AUTOMATION & ARTIFICIAL INTELLIGENCE:  
A BRAVE NEW WORLD**

**Maurice Conti**, Chief Innovation Officer, Alpha

**10:00 – 10:45**

**RISE OF THE QUANTS:  
THE NEW KINGS OF WALL STREET**

- From discretionary to systematic
- The search for talent and limitations of machines
- Re-engineering core processes in front, middle and back offices
- Encouraging product, process and business model innovations
- Retaining a craft heritage

Chair: **Gillian Kemmerer**, Anchor & U.S. head of programming, Asset TV

**Mark Carhart**, Chief Investment Officer & Founding Partner, Kepos Capital

**Igor Tulchinsky**, Founder, Chairman & CEO, WorldQuant LLC

**Andre Stern**, Founder and Principal, Oxford Asset Management

**☕ 10:45 – 11:05**

**NETWORKING AND COFFEE**



11:05 – 11:45

**HARNESSING THE TRANSFORMATIONAL POWER OF TECHNOLOGY, MACHINE LEARNING & THE BLOCKCHAIN REVOLUTION**

- Understanding why AI is anything but artificial
- Exploring the potential of technology & impact on business growth
- Achieving an optimal human-machine interface
- Fool proofing cyber security and data protection

Chair: **Tarun Ramadorai**, Professor of Financial Economics, Imperial College London  
**Christopher McChesney**, Senior Vice President, Global Head of Alternative Fund Services, Brown Brothers Harriman  
**Steve Potter**, Vice Chairman, Northern Trust  
**Matt Galligan**, Co-Founder & CEO, The Picks & Shovels Co.

11:45 – 12:30

**DELIVERING A 'DIGITAL CLIENT EXPERIENCE'**

- Delivering personalised, natural, seamless, intuitive service
- Offering educational tools for mass market clients
- Offering immediacy, connectivity and ubiquity to clients
- Cultivating a digital brand & incorporating AI/ Machine Learning

Chair: **William J. Kelly**, President & CEO, CAIA  
**Valerie Sill**, President, CEO & CIO, Dupont Capital Management  
**Chris Denune**, Executive Director, JP Morgan Private Bank  
**Bill Woodson**, Managing Director, Citi Private Bank  
**Andrew Schofield**, Partner, KPMG

🍷 12:30 – 1:45

**LUNCH**

1:45 – 2:10

**REGENERATIVE MEDICINE: CURRENT CONCEPTS AND CHANGING TRENDS**

**Dr Anthony Atala**, Director of the Wake Forest Institute for Regenerative Medicine, Wake Forest School of Medicine

2:10 – 2:55

**OVER 100 YEARS INVESTING IN HEDGE FUNDS – WHAT CAN WE LEARN FOR THE FUTURE?**

- Recrafting the promise of uncorrelated absolute returns
- Deepening and broadening existing capabilities
- Venturing into new markets via new generation of platforms
- Enhancing scalability via the 'network effect' from technology
- Creating a win-win for managers and their clients alike

Chair: **Peter H Fletcher**, Managing Director, PHF Capital Inc.

**Joel Katzman**, President, Katzman Advisors  
**Alain DeCoster**, Managing Partner, ABS Investment Management

**Kathryn Crecelius**, Vice President, Investments, and CIO (retired), Johns Hopkins University

**Elise Rosenberg**, Director- Capital Solutions, Barclays



# DAY 1

## FEBRUARY 8, 2018 ANCHORING INTO THE DIGITAL FUTURE

2:55 – 3:35

### THE FUTURE: INVESTING FOR IMPACT

Chair: **Tania Carnegie**, Chief Impact Officer & Leader, KPMG

**Roxanne Joyal**, CEO, ME to WE

**Johann Koss**, President, Waratah Impact

**Abigail Noble**, CEO, The Impact

**Jack Inglis**, CEO, Alternative Investment Management Association (AIMA)

☕ 3:35 – 3:55

### ICE CREAM BREAK & NETWORKING

3:55 – 4:20

### AN INDUSTRY VISION: THE DAWN OF A NEW ERA IN PRIVATE EQUITY

- Harnessing the power of technology in delivering better returns
- Opening up new frontiers in search of new opportunity sets
- Doing old things better as well as doing new things
- Delivering a compelling value proposition

**Daniel A. D'Aniello**, co-Founder & Chairman, The Carlyle Group

4:20 – 5:00

### ALPHA: A FANTASTIC BEAST AND WHERE TO FIND IT

- Emerging Asset Allocation Models
- Applying AI to the investment process and securities selection
- Private Equity and the art of the deal
- Minimising behavioural biases
- Blending the art and science of investing

Chair: **Jack Inglis**, CEO, Alternative Investment Management Association (AIMA)

**Michael Falk**, Chairman & Managing Partner, Comvest Partners

**Max Darnell**, Managing Partner & CIO, First Quadrant

**Nathanaël Benzaken**, CEO, Lyxor Asset Management Inc.

5:00 – 5:40

### EVERY SECOND COUNTS: BATTLE FOR THE FUTURE

- A fast paced round of market updates
- Experts in hedge, fund finance and investment management try to beat the buzzer
- The final test? A lightning Fintech round.

Chair: **Catherine Pham**, Partner, Mourant Ozannes

**Carolyn Baker**, Vice President, State Street Bank

**Greg Lemaich**, General Counsel & CCO, Polar Asset Management Partners Inc.

**Luc Jansen**, Partner, Kirkland & Ellis LLP

**Karl A. Cole-Frieman**, Partner, Cole-Frieman & Mallon LLP

5:45 – 6:15

### AN AUDIENCE WITH DANICA PATRICK, DRIVER IN THE MONSTER ENERGY NASCAR CUP SERIES WITH LINETTE LOPEZ, BUSINESS INSIDER





08:10 – 08:15

**CHAIRMAN'S REFLECTIONS ON THE FIRST DAY**

**Anthony Cowell**, Partner, KPMG

08:15 – 08:20

**CAYMAN FINANCE**

**Jude Scott**, CEO, Cayman Finance

08:20 – 08:45

**TECHNOLOGY & GLOBALISATION: HOW TO PREDICT IN UNPREDICTABLE TIMES**

**Michelle McCloskey**, President of Americas, Man Group

8:45 – 9:25

**INVESTING & WINNING IN A WORLD OF UNCERTAINTY**

- What is so unique and not so unique about the current uncertainty facing the investors?
- What is the outlook for Global Macro in a world of uncertainty and how do we find value?
- For the foreseeable future, are we likely to be in a state where the traditional value drivers will mainly remain disconnected from their fundamentals, as has been the case under QE?
- Where will be the value opportunities and value traps?
- What are the key do's and don'ts for investors?

Chair: **Peter Smith**, Asset Management Editor/ FTfm Editor, Financial Times

**Constance Hunter**, Principal, Chief Economist, KPMG

**Ben Melkman**, Founder, CEO and CIO, Light Sky Macro LP

**Jim McCaughan**, CEO, Principal Global Investors

9:25 – 9:55

**AN AUDIENCE WITH ROBERT O'NEIL, FORMER SEAL TEAM SIX LEADER, NEW YORK TIMES BESTSELLING AUTHOR, FOXNEWS CONTRIBUTOR, PUBLIC SPEAKER AND CO-FOUNDER OF YOUR GRATEFUL NATION.**

☕ 9:55 – 10:10

**NETWORKING AND COFFEE**

10:10 – 10:40

**INFINITE REALITY: THE VIRTUAL WORLD**

**Professor Jeremy Bailenson**, Founding Director, Virtual Human Interaction Lab, Stanford University

10:40 – 11:20

**LIVING THROUGH REGIME SHIFTS: CREATING NEW INVESTMENT OPPORTUNITIES**

- Assessing the impact of a global shift from monetary to fiscal policy, from deflation to inflation, from over-regulation to deregulation, from globalism to protection
- Looking out for new opportunities into alternative investments
- Capitalising on the changing asset class correlations at different phases of the shift
- Managing political risks in a debt-fuelled world

Chair: **Professor Amin Rajan**, CEO, CREATE-Research

**Darsh Preet Singh**, Managing Partner & CIO, Hazoor Partners

**Carl Stork**, President, Ciconia & Co. LLC

**Mark Yusko**, CEO and CIO Morgan Creek Capital Management, LLC



11:20 – 12:00

**LEADING THE INDUSTRY INTO A DIGITAL FUTURE:  
OPPORTUNITIES AND CHALLENGES**

- Creating new opportunity sets in credit
- Venturing into new geographies in search of yield via unconstrained investing
- Future proofing the portfolio
- Setting a compelling vision for the business
- Investing in a digital infrastructure and skills
- Enhancing the alpha capability and operating leverage

Chair: **Adi Divgi**, President & CIO, EA Global LLC  
**Mary Cahill**, Retired CIO, Emory Investment Management  
**Sally Staley**, Advisor, Trustee & Former CIO, Independent Investment Governance Advisor  
**Ron Barin**, CIO, ALCOA  
**Laurie Mahon**, Managing Director and Co-Head Global Infrastructure & Power Global Investment Banking CIBC Capital Markets

12:00 – 12:30

**GROWTH AND EVOLUTION OF COMMERCIAL RE**

- Rationale for FinRe and life & annuity reinsurance
- Investment portfolio construction and considerations
- Reasons why Cayman is seeing exponential growth

Chair: **David Watt**, Partner, KPMG  
**Andrew Kenney**, Investment Manager, Aureum Re  
**Adrian Lynch**, Managing Director, AON  
**Kevin Butler**, Partner, Conyers Dill & Pearman

🍷 12:30 – 1:40

**LUNCH**

1:40 – 2:10

**AN AUDIENCE WITH DR. YANIS VAROUFAKIS,  
FORMER MINISTER OF FINANCE, GREECE,  
PROFESSOR OF ECONOMICS, CO-FOUNDER,  
DIEM25**

2:10 – 2:50

**A GLOBAL PERSPECTIVE FROM TOP ALLOCATORS:  
CONSTRUCTING ALLOCATIONS IN A DIGITAL  
WORLD**

- Managing Illiquidity for large investment pools
- Minimizing risk from macro economic policy changes
- Anticipating bi-modal opportunity sets in allocation strategy
- Search for yield – opportunities and consequences

Chair: **Phil Schmitt**, President & CEO, Summerwood Group Inc  
**Don Raymond**, Managing Partner & Chief Investment Officer, Alignvest Investment Management  
**Eric Pedde**, Director, External Fund Management AIMCO  
**David Gilmore**, Managing Director, The Harry & Jeanette Weinberg Foundation, Inc  
**Jeffrey Klein**, CEO & Deputy CIO, Aptitude Investment Management

2:50 – 3:30

**MANAGING CLIENT EXPECTATIONS AS CENTRAL  
BANKS RETREAT**

- Setting the Scene: An Economic Outlook (Overview by N.Roubini)
- Managing expectations of pension funds as central banks' policies change
- Realistic yield forecasts for different asset classes and regional markets
- Challenges for asset managers in a world of uncertainty
- What innovations are needed ensure an alignment of interest?

Chair: **Mark Roberts**, CIO, Ironside Asset Advisors LLC  
**David Brief**, CIO, Jewish Federation of Metropolitan Chicago  
**Timothy Runnalls**, Senior Director of Real Assets, Ascension Investment Management  
**Grégoire Bordier**, Senior Partner, Bordier & Cie  
**Nouriel Roubini**, Chairman & CEO, Roubini Macro Associates

DAY  
2

FEBRUARY 9, 2018  
FACING THE CHALLENGES TO GLOBALISATION

☕ 3:30 – 3:45

**ICE CREAM BREAK & NETWORKING**

3:45 – 4:00

**LIFE 3.0: HUMAN V MACHINE**

**Jon Cohen**, Partner, KPMG

**Sophia**, Robot, Hanson Robotics Ltd

4:00 – 4:40

**FUTURETECH: HOW EMERGING TECHNOLOGY MAY  
CHANGE THE ASSET MANAGEMENT INDUSTRY**

- Applications for asset managers
- The digital client experience
- Service counterparts
- Obstacles on the road to digital nirvana

Chair: **Daniel Santiago**, Harmonic Fund Services

**Chris Ferris**, CTO IBM Open Source Solutions  
& Chair of the HyperLedger Technical Steering  
Committee

**Anatola He**, Vice President of Business  
Development, HyperScience

**Dutt Chintalapati**, Co-Founder & COO, EZOPS

**Jonathan Levi**, Founder of HACERA

4:40 – 5:25

**PHILANTHROPY & IMPACT: A NEW MODEL FOR A  
NEW AGE**

- Changing investment dynamics in a globalized world
- Raising the Corporate Citizenship agenda
- The reality of IMPACT
- Blending economic and social development
- Combining the brain and the heart

Chair: **Lord Dr. Michael Hastings CBE**, Global  
Head of Corporate Citizenship, KPMG

**Dipender Saluja**, Partner & Managing Director,  
Capricorn Investments

**Kwami Williams**, Co-Founder, MoringaConnect  
**Giles Gunsekera**, Chief Executive Officer,  
Global Impact Initiative

5:25 – 5:30

**CHAIRMAN'S CLOSING REMARKS**

**Anthony Cowell**, Partner, KPMG

5:30 – 6:30

**KEYNOTE SEAFIRE CHAT**

**Will Smith**, Actor, Film Producer, Businessman,  
Investor, Philanthropist  
With

**Chris Duggan**, Director of the Kenneth B. Dart  
Foundation & Vice President, Dart Enterprises Ltd.

6:30

**LEGENDS, CAMANA BAY**

Tickets available for purchase online at  
[www.legendscayman.ky](http://www.legendscayman.ky)





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DATE: FEBRUARY 8-9, 2018  
LOCATION: GRAND CAYMAN, CAYMAN ISLANDS  
VENUE: KIMPTON SEAFIRE RESORT+SPA  
WWW: CAYMANSUMMIT.COM

Executive Platinum



Gold



Silver



Bronze

