

DAY 1: ANCHORING TO A HIGH DIGITAL, LOW CARBON FUTURE

- 07:00 – 08:15 **BREAKFAST AND NETWORKING**
- 08.15 – 08:25 **INTRODUCTION BY DART ENTERPRISES**
Chris Duggan, Vice President, Dart Enterprises Ltd & Dart Family Office Representative
- 08.25 – 08.30 **ADDRESS FROM HE THE GOVERNOR MARTYN ROPER, OBE**
- 08:30 – 08:35 **ADDRESS FROM HON. JOSEPH HEW, MLA**
Minister of Commerce, Planning and Infrastructure
- 08:35 – 08:50 **EDITORIAL BOARD CHAIRMAN'S WELCOME**
Anthony Cowell, Partner, KPMG
- 08:50 – 09:10 **SURFACE TENSION: TRADE, INVESTMENT, CLIMATE**
Ian Bremmer, President & Founder, Eurasia Group & GZERO Media
- 09:10 – 09:30 **HARNESSING THE POWER OF INNOVATION TO CREATE A NEW FUTURE**
Leda Braga, Chief Executive Officer, Systematica
- 09:30 – 10:00 **A WORLD IN TRANSITION: WHAT MATTERS NOW?**
- *Embracing the Industrial Revolution 4.0 & hyper connectivity*
 - *Dealing with the inexact science of climate change*
 - *Creating investible information and actionable insights*
 - *Investing in a return constrained world – do conventional tools and models apply*
- Moderated by William J. Kelly, CEO, CAIA Association**
Rohitesh Dhawan, Director of Global Energy & Natural Resources, Eurasia Group
Bonnie Wongtrakool, Global Head of ESG Investments & Portfolio Manager, Western Asset Management
- 10:00 – 10:50 **FAST & FURIOUS: ACCELERATING ESG INTO ALTERNATIVE INVESTMENTS**
- *Building ESG risk factors into the investment process*
 - *Developing frameworks for Client Engagement*
 - *Identifying inflection points as market price in climate change risks*
 - *Understanding the separate risk-returns dynamic of "E", "S" and "G"*
 - *Robust performance attribution analysis*
- Moderated by Leanna Orr, Deputy Editor, Institutional Investor**
Barbara Ann Bernard, Founder & Chief Investment Officer, Wincrest Capital
Asha Mehta, SVP, Director of Responsible Investing, Acadian Asset Management
Kareen Stangherlin, Chief Executive Officer, Zelos Capital Ltd.
Martha Tredgett-Bender, Canadian Representative, LGT Capital Partners
Anna-Marie Wascher, Founder & Chief Executive Officer, Flat World Partners

10:50– 11:10 NETWORKING AND COFFEE

11:10 – 11:30 **THE DIGITAL REVOLUTION WITH WENCES CASARES, CEO, XAPO**
Moderated by Emma Walden, CAIS Correspondent

11:30 – 12.10 **HUMANS & MACHINES: THE NEXT GENERATION**

- *Investing in systematic strategies at the intersection of ethics and alternative data*
- *Exploring the commonalities between machines and sustainability*
- *Understanding the limitations of Alternative Data and AI*
- *The explosion and war for data: build or buy*
- *The rise of the ‘quantementalist’*

Moderated by Devin Banerjee, Senior Financial Services Editor, LinkedIn

Christina Qi, Founding Partner, Domeyard LP

Dr. Mark Jackson, Scientific Lead of Business Development, Cambridge Quantum Computing

Caroline Sherman, Chief Product Officer and Managing Director, Quantopian

Jessica Stauth, Managing Director, Fidelity Labs

12:10 – 12.50 **INVESTING IN THE INTERSECTION OF TECHNOLOGY**

Moderated by Claire Griffin, Director, KPMG

Aymeric Sallin, Founder & Chief Executive Officer, NanoDimension

Yaro Tenzer, Co-Founder, Right-Hand Robotics

Stephen Toebes, Chief Robotics Officer, HDS Global

12:50 – 2:00 LUNCH

2:00 – 2:25 **DESIGNING A WORLD FOR TRUST**

Dan Ariely, Author & James B Duke Professor of Psychology and Behavioral Economics, Duke University

2:25– 3:05 **CREATING ALPHA, DEVELOPING TRUST**

- *Delivering better returns and client experience*
- *Engaging and investing actively with managers*
- *Searching for an edge with alternative data*
- *Raising client awareness about the long-term nature of sustainable investing*
- *Developing a client centric model based on a clear alignment of interest*

Moderated by Phil Schmitt, President & Chief Executive Officer, Summerwood Group

Jeffrey Klein, Founding Partner, Aptitude Investment Management

Victoria Rock, Global Head of Alternatives, Legg Mason Global Asset Management

Michael Weinberg, Managing Director, APG and Adjunct Professor, Columbia Business School.

Mark Shulgan, Managing Director, Head of Growth Equity, OMERS

- 3:05 – 3:30 **TALENT & CULTURE: A PERSONAL JOURNEY ACROSS FOUR DECADES**
Moderated by Amanda Pullinger, Chief Executive Officer & Founder, 100 Women in Finance
Elaine Crocker, President, Moore Capital Management
- 3:30 – 4:10 **THE BLUE ZONE: INVESTING FOR THE LONG TERM.**
CHARTERED ALTERNATIVE INVESTMENTS ASSOCIATION
Moderated by William Kelly, Chief Executive Officer, CAIA Association
Patricia Alejo, Portfolio Manager, Pontificia Universidad Javeriana
Clark Cheng, Chief Investment Officer, Merrimac Corp
Stephen J Thompson, Executive Director, Department of Treasury Board & Finance
Anna Totdahl, Investment Officer, Oregon State University
- 4:10 – 4:30 **ICE CREAM BREAK & NETWORKING**
- 4:30 - 4:55 **IMAGINE: WITH PAUL AND KIM POLMAN**
Moderated by Emma Walden, CAIS Correspondent
Kim Polman, Co-Founder, Reboot the Future Foundation
Paul Polman, Co-Founder & Chair, IMAGINE
- 4:55 – 5.40 **PHILANTHROPY: A NEW MODEL FOR A NEW AGE**
 - *Changing the dynamics of giving in a globalised world*
 - *Treating corporate citizenship as a new 'license to operate'*
 - *Blending economic and social development*
 - *Fusing hearts and minds***Moderated by Lord Dr. Hastings of Scarisbrick CBE, Chancellor, Regents University London**
Valerie Chort, VP of Corporate Citizenship, RBC
Mike Penrose, Founder & Chief Executive Officer, The Sustainability Group
Paul Polman, Co-Founder, IMAGINE
Kim Polman, Founder, Reboot The Future Foundation
- 5:45 – 6:45 **A SEAFIRE CHAT WITH GEENA DAVIS, ACADEMY AWARD WINNING ACTOOR; FOUNDER & CHAIR, GEENA DAVIS INSTITUE ON GENDER IN MEDIA**
Moderated by Tammi Sulliman, Senior Manager, News Director, Dart
- 7:00 -10:00 **DINNER BY THE BAY**
Dining and networking under the stars on The Crescent at Camana Bay.
A complimentary shuttle service to Camana Bay will operate from the hotel ballroom foyer at 7pm and 7.30pm with return transfers starting at 9pm. Entrance to the event is via Cassia Court at Camana Bay. Valet parking is available.
Please wear your CAIS20 delegate pass for this event.

DAY 2: PREPARING FOR GEOPOLITICAL CHALLENGES

07:00 – 08:00 BREAKFAST AND NETWORKING

08:10 – 08:15 EDITORIAL CHAIRMAN'S REFLECTIONS ON THE FIRST DAY

Anthony Cowell, Partner, KPMG

08:15 – 08:20 ADDRESS FROM ERIC BUSH

Chief Officer, Ministry of International Trade, Investment, Aviation and Maritime Affairs, Cayman Islands Government.

08:20 – 08:45 **AROUND THE WORLD WITH MARK YUSKO**

Mark Yusko, Chief Investment Officer of Morgan Creek Capital Management LLC

08:45- 09:25

GUARDIANS OF THE GALAXY 2.0: THE MACRO DILEMMA

- *Understanding the dynamics of trade and currency wars*
- *Crafting credible risk mitigation–management strategies*
- *Seeing challenges as concealed opportunities*
- *Spotting new opportunities in a highly dynamic environment*

Moderated by Rohitesh Dhawan, Director of Global Energy & Natural Resources, Eurasia Group.

Gerald Butts, Senior Advisor, Eurasia Group

Ian de Verteuil, Managing Director, Head Portfolio Strategy, CIBC Capital Markets

Megan Greene, Senior Fellow, Harvard Kennedy School

Constance Hunter, Chief Economist, KPMG

Jim McCaughan, Executive, Asset Manager & Change Agent

09:25 – 9:50

THE RACE OF OUR LIVES

Moderated by Leslie Norton, Senior Editor, Barron's Magazine

A discussion with Jeremy Grantham, CBE, Co-Founder and Chief Investment Strategist
Grantham Mayo Van Otterloo

09:50 – 10:40

SUSTAINABLE RETURNS FOR A SUSTAINABLE FUTURE

- *Building a sustainable investment program*
- *Defining objectives and program benchmarks*
- *Developing a robust framework around portfolio engagement*
- *Integration of ESG and systematic strategies*

Moderated by Rebecca Palmer, Director, KPMG

Inna Khidekel, Partner & Managing Director, Bridge Investment Group

Dr Riti Samanta, Head of Systematic Fixed Income Strategy, Grantham Mayo van Otterloo

George Mussali, Chief Investment Officer and Head of Research, Equity, PanAgora

Lindsay Patrick, Managing Director & Head, Sustainable Finance, RBC Capital Markets

Deborah Spalding, CommonFund Asset Management

- 10:40 – 11:00 **NETWORKING AND COFFEE**
- 11:00 – 11:30 **OFF THE FIELD: LESSONS IN INNOVATION**
Moderated by John Stackhouse, Senior Vice President, RBC
Dave McKay, President & Chief Executive Officer, RBC
MaryAnn Turcke, Chief Operating Officer, National Football League
- 11:30 – 12:10 **ALTERNATIVE INVESTING: REBOOTING THE INVESTMENT ENGINE**
Learning lessons from sub par performance in this decade
The rise of alternative risk premia strategies
Searching for alpha across credit
Deepening and broadening existing capabilities
Expanding Co-investing opportunities

Moderated by Grace Reyes, CEO, The Investment Diversity Exchange
Nancy Davis, Chief Investment Officer & Founder Quadratic Capital Management LLC
Lionel Erdely, Head & Chief Investment Officer ARI, Investcorp
Theodore Economou, Chief Investment Officer, Lombard Odier and Board Member, Virginia Retirement System
Tracy McHale Stuart, Managing Partner and CEO, Corbin Capital
- 12:10 – 12:35 **ALTERNATIVE INVESTMENTS: THE NEXT FRONTIER**
Moderated by Emma Walden, CAIS Correspondent
A fireside chat with Daniel D’Aniello, Co-Founder and Chairman of the Carlyle Group
- 12:35 – 1:45 **LUNCH**
- 1:45 – 2:10 **THE WORLD IN 2050: WHAT REALLY LIES AHEAD?**
Moderated by Rachel Pether, Managing Partner, Sovereign Wealth Ltd.
A Seafire chat with Rodney Brooks, Panasonic Professor of Robotics (emeritus) MIT
- 2:10 – 2:50 **DIGITAL THE DAY AFTER TOMORROW**
Moderated by Andrew Schofield, Partner, KPMG
Nisa Amoils, Partner, Grasshopper Capital
Laura Bailey, Chairperson, Qadre
Tom Kehoe, Managing Director, Global Head of Research & Communications
Breanne Madigan, Head of Global Institutional Markets, Ripple
- 2.50 – 3.30 **EMERGING MARKETS: WILL THEY ROAR BACK?**
Moderated by Mark Roberts, Chief Investment Officer, Ironside Asset Advisors
Carla Buffulin, Portfolio Manager, EMSO Asset Management
Emily Alejos, Managing Director & Chief Investment Officer, Cartica Management LLC
John Haslett, Director & Portfolio Manager, Graphite Asset Advisory

3:30 – 3:50 NETWORKING BREAK

3.50 – 4.30 **A NEW WORLD ORDER: GLOBAL, DIGITAL, RESPONSIBLE.**

CHARTERED ALTERNATIVE INVESTMENT ASSOCIATION

Moderated by John Bowman, Senior Managing Director, CAIA Association

Robert Cultraro, Senior Vice President, Chief Investment and Pension Officer, Hydro One

Mauricio Guzman, Chief Investment Officer, Pontificia Universidad Javeriana

Sharmila Kassam, Founder / Consultant, Aligned Capital Investing

Ju Hui Lee, Portfolio Design, CPP Investment Board

4.30 – 5:10 **BECOMING X: IF YOU KNEW WHAT THEY KNEW, WHAT WOULD YOU BECOME?**

Moderated by Jackie Doak, President, Business Development, Dart

Paul Gurney, Adventurer, Entrepreneur & Founder, BecomingX

Dr. Sabrina Cohen-Hatton, British firefighter, psychologist and writer

Dr Sabrina Kay, serial entrepreneur, tech educator, fashion designer, philanthropist

5:15 – 6:15 **A SEAFIRE CHAT WITH BEAR GRYLLS, OBE, GLOBAL ADVENTURER, TV HOST
AND CO-FOUNDER OF BECOMINGX**

**Moderated by Chris Duggan, CAIS Chair and Vice President, Business Development,
Dart Family Office.**