



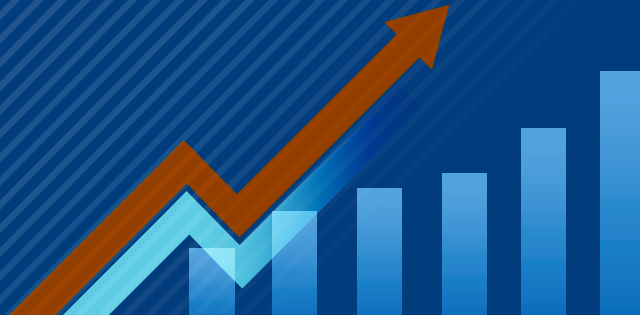
Toronto Stock
Exchange



ETFs

Exchange Traded Funds

CONFERENCE AGENDA



4TH ANNUAL ETF CONFERENCE FOR INSTITUTIONAL INVESTORS

THURSDAY, OCTOBER 8, 2015

TMX GALLERY
THE EXCHANGE TOWER
GROUND FLOOR
130 KING STREET WEST
TORONTO, ON M5X 1J2

1:45 PM

REGISTRATION

2:00 PM

WELCOME AND OPENING REMARKS

2:05 PM

GLOBAL ETF LANDSCAPE OVERVIEW

Presenter: **Deborah Fuhr**, Managing Partner, ETFGI LLP

2:45 PM

LIQUIDITY & TRADING – FIXED INCOME

- Liquidity issues in the bond/debt market and liquidity of fixed income ETFs
- Canada and U.S. perspectives on impact of post-crisis U.S. regulatory changes

Moderator:

- **Peter Haynes**, Managing Director, Index Products, Institutional Equities, TD Securities

Panelists:

- **Kathryn Sweeney**, Managing Director, Goldman Sachs
- **Kevin Fong**, Managing Director, BMO Capital Markets
- **Derek Brown**, Vice President and Senior Portfolio Manager Fixed Income, Fiera Capital

3:30 PM

COFFEE BREAK

PARTNERS



CFA Society
Toronto

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3:45 PM

INDEXING - SCIENTIFIC BETA

- Evolving nature of indexing and construction of ETFs

Moderator:

- **Deborah Fuhr**, Managing Partner, ETFGI LLP

Panelists:

- **Dr. Eric Shirbini**, Global Product Specialist, ERI Scientific Beta
 - **Guillermo Cano**, Director, Alternately Weighted Products, FTSE Russell
 - **Aye Soe**, Senior Director, Global Research and Design, S&PDJ
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4:30 PM

ASSET MANAGEMENT - ETFS AS PART OF THE TOOL KIT

- Effectiveness of ETFs relative to other investment vehicles (swaps, futures, baskets)

Moderator:

- **Dr. Marlene Puffer**, Partner, Alignvest Investment Management

Panelists:

- **Kathryn Sweeney**, Managing Director, Goldman Sachs
 - **Dr. Daniel Straus**, Research Analyst, ETF Research & Strategy, Derivatives & Structured Products, National Bank Financial
 - **Stephen Lingard**, Senior Vice President, Portfolio Manager, Franklin Templeton Solutions
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5:10 PM

CLOSING REMARKS

5:15 PM

COCKTAIL RECEPTION