Presented by: the Canadian Association of Alternative Strategies & Assets

CAASA
CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA ANNUAL CONFERENCE 2024

Tuesday, November 12 &
Wednesday, November 13

Conference Educational Partner

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Asset Management One USA Inc. “**AMO USA**” is proud to sponsor the **CAASA Annual Conference 2024** in Montreal

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WELCOME TO THE CAASA ANNUAL CONFERENCE

The CAASA Annual Conference brings together speakers and participants from public and private pension plans, sovereign wealth funds, foundations & endowments, single and multi-family offices, investment dealers, Canadian and global investment management houses, and affiliated service providers. Panels and sponsored table talks sessions will focus on key issues facing investors worldwide including structuring, legal & tax issues, IT and operational areas, and investments - including: hedge funds, CTAs, private equity, private lending, real estate, infrastructure, and cryptoassets/blockchain-related investments.

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15 YEARS

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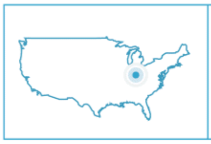
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Hundreds of interfaces to banks, brokerages & exchanges

Fully hosted in our private cloud infrastructure, including backups, disaster recovery & business continuity planning

Developed and supported in house. Our team have built up huge knowledge base of the needs of the Alternative Investment Community.

Fully supporting our clients on investor DD and audit queries

Supporting clients of all sizes: from $1m - $10bn

Delivers considerable savings compared to in house systems.

ASSET CLASSES SUPPORTED
equities, fixed income, commodities/futures, options, foreign exchange, fund-of-funds, cryptocurrencies, real estate, and real assets.

ABOUT CAASA

INCLUSIVE, ACTIVE, AND PAN-ALTERNATIVE

The Canadian Association of Alternative Strategies & Assets (CAASA) was created in response to industry requests for a national group to represent the Canadian alternative investment participants, including investors, asset managers, and service providers. CAASA is inclusive in that it welcomes participation from all companies active in the space as well as select individuals (those with investors) who might want to participate in committees and working groups - or simply attend member events - without their employer being a member of the association. CAASA is very active in both committees & groups and events: 10 conferences in 2023 consisting of 73 panels, 21 in-person events, and 16 webinars as well as publishing 4 papers and attending 29 third-party conferences throughout the year. Pan-alternative, for CAASA, encompasses all alternative strategies and assets including: hedge funds / alternative trading strategies, private and public real estate (funds and direct), private lending, private equity, development & project finance, digital assets / cryptoassets, weather derivatives & cat bonds, and all aspects of diligence, trading, structuring, dealing, and monitoring alternatives in a stand-alone portfolio and as part of a larger investment strategy.

MEMBER BENEFITS

Investors join CAASA to be a part of a formal network of pension plans, foundations, endowments, sovereign wealth funds, and family offices to discuss ideas, strategies, and operational issues particular to their businesses - all within a closed group where managers and service providers may or may not be included, depending on the forum.

Managers see the association as a way to connect with peers, investors, and service providers to speak to fund structuring, sales & marketing, and regulatory issues. CAASA is not a capital introduction platform, but we do create forums where investors and managers can meet organically or via structured meeting sessions where participation by the investors is strictly opt-in.

Service providers participate in our events and working groups as well as assist in the production of thought leadership pieces which provide relevant information to both association members and the industry and investing public at large.

Founders participate in our Founders' Pitch Competitions as well as other initiatives created to propel their fledgeling businesses forward.

NATIONAL AND GLOBAL

CAASA believes that the Canadian alternatives industry has a great deal to offer Canadians and the global community. The *Canadian Model of Pension Management* is well-known for its large alternatives focus, managed in-house in many cases with substantial allocations to external managers as well. Canadian investment managers operate in a robust regulatory regime (of hedge fund managers) that is becoming the norm across the globe and a stable banking back-drop that provides solace for investors as well as opportunities for managers. Talent in investment management (approximately 10% of all CFA charterholders reside in Canada) as well as newer areas such as digital assets and robo-advisory services are a differentiator. Of course, Canadian investors and managers are keen to learn of best practices in operations and portfolio management from their global peers.

WHY JOIN?

Founded in 2018, we stand at 400+ members and their motivations are plentiful and varied. Whether an investor, manager, or service provider, some seek a group of like-minded individuals in the alts space to connect with on an on-going and (semi-)structured basis; others have a more commercial interest in that they are intent upon being aware of the newest trends in the industry and (providing they have one) presenting their knowledge to an audience of peers; and others have made their mark (or are on their way to doing so) and really just want to give back to a group of people that has done a great deal for them. Whatever your motivation, if you're not in membership yet we'd love to hear from you!

FORMATS FOR THE DAYS

A PLETHORA OF WAYS TO LEARN AND INTERACT

TÊTE-À-TÊTE MEETINGS

This is your opportunity to schedule one-on-one meetings with any conference delegate. All matching is best completed by end of day on November 11th to ensure the scheduling software has time to confirm the meetings and each one is served up to you at the right time.

You can schedule as few or as many meetings as they might like. Over the years we received feedback that these are possibly the best part of our conferences as it gives folks an opportunity to connect away from the scheduled panels and meal times and really drill down into their respective interests. The software automatically suggests times that are mutually convenient for both parties.

Anyone can book a meeting with any other delegate. Please decline meetings that you might not be interested in or able to commit too - then the other party can invite another to chat. And if you are interested, you're free to connect via our messenger or email (we do not release delegate emails or other contact information, so you'll have to ask for it or send yours along to them and await a response).

All meetings will be scheduled via our conference app and web portal. Meetings are best booked by noon on Monday, November 11th to both parties accept the meeting. Delegates are free to have ad hoc chats as well, of course, during the course of the conference at the venue.

TABLE TALKS

We do not sell paid-for speaking spots, preferring delegates to choose when they might like to hear from sponsors. Table Talks are 25-minute sessions where anywhere from 2 to 12 delegates can get a briefing on a topic and participate in an interactive discussion. As with all of our events, we refrain from pay-to-play and draw all speakers from membership and prefer audiences to opt-in to more niche discussions, as will be delivered at the Table Talks.

Attendees can choose up to two sessions out of those offered on the day of the conference. **Titles/ topics of each session will be published on our conference app and web portal, also where attendees will register for their desired sessions. This should be completed by noon on Monday, November 11th to ensure a table is not fully-booked, or delegates can simply sit at any of the open tables at those times.**

HGC | INVESTMENT MANAGEMENT INC.

HGC Investment Management Inc. ("HGC") is an employee-owned, alternative asset management firm based in Toronto. The Manager believes that hedge funds should have narrow mandates for investor clarity, produce uncorrelated returns to the market, have a low level of volatility and a high degree of liquidity. The core ethos at HGC is of a wealth preservationist nature while delivering an attractive return on a risk/reward basis. Our offering, The HGC Fund, is an event-driven strategy focused on arbitrage with a 10+ year track record that has achieved positive returns every year since inception in 2013.

OUR PHILOSOPHY IS SIMPLE:

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Return Characteristics

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LOW MARKET CORRELATION

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CAASA ANNUAL CONFERENCE 2024
TUESDAY, NOV 12TH AGENDA

11:00 AM	**Registration Opens – Sponsors, Investors, & Speakers ONLY** We welcome all CAASA members who are sponsors of the event as well as all speaker and investors (e.g., those employed by pensions, E&Fs, SWFs, single family offices, and certain wealth managers). All other registered delegates are welcome to the General Reception in the evening.
11:00 AM	**1:1 meetings** This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc. We do not require a minimum number of meetings/interactions and encourage everyone to network at their own pace.
12:00 PM	**Welcome Remarks, Lunch & Content** Welcome to the Seventh CAASA Annual Conference in Montreal! The growth of CAASA has occurred much because of the success of this event and this is due a great deal to the talent and hard work of Ranjan Bhaduri of Bodhi Research Group who organizes our programming for this (and predecessor events at another organization), our flagship, conference. **James Burron,** CAASA, **Dr. Ranjan Bhaduri**, Bodhi Research Group, and **Lauretta Chame**, IMCO (Master of Ceremonies)
12:30 PM	**Lunch Keynote – Direct Value Creation and Capture in the Pension Fund Industry: Five Examples** This keynote will examine how Canadian pension funds create and capture value through landmark transactions, highlighting strategies like scaling, fee reduction, stakeholder coordination, and risk mitigation strategies. It will also explore how smaller funds adopt these practices. **Sebastien Betermier,** McGill University
1:15 PM	**Panel: Portfolio Perspectives** This session highlights different portfolio snapshots pertaining to innovation, best ideas in absolute return strategies, and the impact of rates on recent asset mix decisions. **Hazlitt Gill,** BCI**, Jeremy Heer,** University of Illinois Foundation**, John Simitzis,** Kruger Inc.**, Derek Lublin,** PSP Investments, and **Louis-Philippe Roy**, Joddes

CAASA ANNUAL CONFERENCE 2024
ASSET MANAGERS - TUESDAY, NOV 12 - TABLE TALKS

Brett Lindros
President

HGC Investment Management Inc. :
M&A Outlook

Mario Delisle
Vice President, Client Solutions

Trans-Canada Capital Inc :
Building a Resilient Portfolio: A Holistic Private Markets Strategy

Ali Katz
Managing Partner, Head of Institutional Sales

Hazelview Investments :
Optimizing Returns in Real Estate with Exposure to Multi-Family

Tim Wittig
Partner, Director of Capital Direct Financial

Capital Direct :
An Alternative Approach to Fixed Income

Mark Tower
Executive Director, Head of Business Development & Investor Relations

Anne-Sophie van Royen
Chief Investment Officer, Quantitative Strategies

Asset Management One USA :
An Introduction to Asset Management One USA

Vianney Gouny
SVP, Alternative Client Solution

Wilshire :
Wilshire: Your trusted Alternatives Solutions Provider

Daniel Leger
Managing Director

MGG Investment Group :
Direct Lending at a time of higher for longer interest rates

Peter Vaiciunas
Quantitative Portfolio Specialist

Capital Fund Management :
Scalable Alpha: Innovation in Hedge Fund Strategies

Thierry Beliar
Managing Director

Intermediate Capital Group :
Opportunity Knocks: Unlocking Value Through Flexible Capital

CAASA ANNUAL CONFERENCE 2024

ASSET MANAGERS - TUESDAY, NOV 12 - TABLE TALKS

Simon Judes
Co-Chief Investment Officer

James Gilbert
Head of Client Solutions

Winton :
The Strategic Case for a CTA Allocation Across All Portfolios

WINTON

Guillaume Jamet
Principal Manager and co-CIO

Metori :
How correlations should drive portfolio construction ?

METORI Capital Management

Jim McGovern
Director Wealth Management

Maynbridge Capital :
The State of The Asset-Backed Private Debt Market And How To Participate In It

MAYNBRIDGE CAPITAL

Jay Barrett
Executive Vice President - Private Capital Markets

Veripath Farmland Funds :
Canadian Farmland Investing: Slow and Steady Wins the Race

VERIPATH FARMLAND FUNDS

CAASA ANNUAL CONFERENCE 2024
TUESDAY, NOV 12TH AGENDA

2:00 PM	**Table Talks (Managers)** You can view all the topics that our managers will be presenting on the previous page or on the conference app.
3:00 PM	**1:1 Meetings** This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc. We do not require a minimum number of meetings/interactions and encourage everyone to network at their own pace.
4:00 PM	**NowTalk: Insurance-Linked Strategies – More than Cat** Understand the world of Insurance-Linked Securities (ILS) with this engaging introduction to Natural Catastrophe, Casualty, Cyber and Life Insurance-linked strategies. This NowTalk explains the mechanics of these strategies, including key characteristics, risks and return drivers, and how they may fit into one's broader portfolio in an alpha-generating way. **Philippe Trahan**, Formerly with OTPP
4:30 PM	**Panel: The Global Hunt for Alpha** What trading strategies have tailwinds given the current capital and commodity market conditions? The best ideas are discussed by talented Pension PMs making allocation decisions. **Angela Lin-Reeve**, HOOPP, **Sandy Poire**, CN Investment Division, **Nirupa Muthurajah**, University Pension Plan, and **Zarqaa Shaikh**, OPTrust
5:00 PM	**Registration Opens for All Delegates**
5:00 PM	**Welcome Reception and Networking – All Delegates**

5:30 PM	**Reception Keynote: Chris Nilan – Power Plays: Lessons in Teamwork, Resilience, and Motivation from the Ice + photo/autograph session** Beloved Habs Ambassador Chris Nilan, who was one of the fiercest fighters in NHL History shares valuable lessons that can be used in business and life. **Chris Nilan,** Montreal Canadiens**, Ranjan Bhaduri,** Bodhi Research Group, and **Luc Verville,** Fondaction
6:30 PM	**End of day** We suggest that delegates use the conference messaging app to reach out to fellow conference goers if they wish to arrange other meetings/dinners.

CAASA ANNUAL CONFERENCE 2024
WEDNESDAY, NOV 13TH AGENDA

8:00 AM	**Registration & Breakfast** Please arrive during these 15 minutes so we can start on time and keep to our busy schedule.
8:15 AM	**Opening Remarks & Curriculum Overview (for all delegates)** We'll give you a brief overview of the day and how we created the curriculum for the day. **James Burron**, CAASA, **Dr. Ranjan Bhaduri**, Bodhi Research Group, and **Lauretta Chame**, IMCO (Master of Ceremonies)
8:30 AM	**NowTalk: The Climate-Driven Financial Transition: Risk and Resilience** The global annual financing requirement to meet climate commitments is estimated at $4-5 trillion. Meanwhile, physical and transition risks are reshaping business models across industries. As investment professionals, we must understand climate disclosures, assess climate risks in our investments, and seize emerging opportunities. **Niall Whelan,** Bodhi Research Group
9:00 AM	**Panel: Private Credit: Trends, Technology, and Transformation** Private credit is evolving rapidly. This panel will explore key drivers, including an expanding investor base, growth in asset-based and specialty finance funds, the impact of big data and AI, differences in underwriting cash flow versus granular assets, shifting business models, and additional emerging trends and insights shaping the private credit landscape. **Pierre-Philippe Ste-Marie**, Bodhi Research Group, and **Jim Geoghegan**, Prime Quadrant, **Yves Caron**, CDPQ

CAASA ANNUAL CONFERENCE 2024

SERVICE PROVIDERS - WEDNESDAY, NOV 13 - TABLE TALKS

Harry Pagel
Senior Vice President - Hedgefacts

Carter Evans
Head of Trading - Terreplein LLC

Featuring Terreplein Investment Management :
Geopolitical Instability & Inflation: The Case for a Commodities Golden Era

Tom Johnston
Managing Director and Canadian Market Head

iCapital :
Bringing World Class Alternative to Wealth Channels

Mathieu Pacheco
Relationship Executive, Client Management

CIBC Mellon :
What's Weighing on Institutional Investors?

Ranjan Bhaduri
Founder & CEO

Pierre-Philippe Ste-Marie
Visiting Researcher

Bodhi Research Group :
Finding Alpha Through Innovation: Strategies for Success

Jordan Villarreal
Associate VP, Private Capital Research

Preqin :
Real Estate and Infrastructure Trends in Canada

CAASA ANNUAL CONFERENCE 2024
WEDNESDAY, NOV 13TH AGENDA

9:30 AM	**Finding Alpha – Family Office Perspectives** This panel explores investment strategies in public and private markets that have tailwinds amid current capital and commodity market conditions, featuring top ideas from family office allocators. **Kevin Craney,** Milburn Services, LLC – Family Office**, Vincent Zhou,** Redjay Asset Management**, Shael Soberano,** Sharno Group Inc., and **Loïc Julé,** Richter Family Office
10:00 AM	**Morning Break**
10:25 AM	**NowTalk: The Risk and Return of Equity and Credit Index Options** This session presents a structural credit risk model for accurately pricing equity and credit indices and their options based on asset dynamics. Findings show alignment in equity and credit option pricing, challenging recent mispricing claims and highlighting the importance of accounting for asset, variance, and jump risks in valuations. **Jan Ericsson,** McGill University
10:45 AM	**Quant Corner** A discussion among leading experts on the latest in quantitative strategies. **Jan Ericsson**, McGill University, **Wagner Dada**, CPP Investments, and **Jean-François Bérubé**, CDPQ
11:15 AM	**Table Talks – Service Provider**
12:15 PM	**Lunch Keynote: CIO Corner** A discussion on the challenges and opportunities CIOs are encountering in the current capital markets landscape. **Pierre-Philippe Ste-Marie,** Bodhi Research Group**, Steve Mahoney,** Nova Scotia Pension Services Corporation, and **Marc Gauthier,** Concordia University

ASSET ALLOCATION STRATEGIES ADJUST TO RISING PRESSURE FROM EXTERNALITIES

Private markets are an area where Canadian asset owners continue to see opportunities to diversify portfolios, increase alpha and reduce risk.

The diversification into alternative asset classes is anticipated to rise in the Canadian pension fund investing space, according to research from CIBC Mellon. The research shows 70% of asset owners raised their exposure to alternative asset classes and privately-owned assets, such as funds of hedge funds, private equity, real estate, and liquid alternatives.

For more information about CIBC Mellon's research projects, please contact:

Shane Kuros
Chief Business Development Officer
+1 647 273 2853

Joe Lacopo
Vice President,
Asset Manager Segment Head,
Client Management
+1 416 643 5454

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CAASA ANNUAL CONFERENCE 2024
WEDNESDAY, NOV 13TH AGENDA

1:30 PM	**1:1 Meetings** This is everyone's opportunity to meet – either as established via our conference meeting & messaging app or ad hoc. We do not require a minimum number of meetings/interactions and encourage everyone to network at their own pace.
2:30 PM	**Panel: A total portfolio approach to climate integration** This panel explores how a total portfolio approach can effectively integrate climate considerations into investment strategies. Experts will discuss best practices for assessing climate risks and opportunities, aligning portfolios with sustainability goals, and navigating the evolving regulatory landscape. **Niall Whelan**, Bodhi Research Group, **Jamy Kallikaden**, CPP Investments, **Maria Clara Rendon**, University Pension Plan Ontario (UPP), **Jason Taylor**, Climate Finance Advisors, and **Guillaume Lavoie**, PSP Investments
3:15 PM	**NowTalk: CAIA – Rise of the Total Portfolio** The Total Portfolio Approach (TPA) emphasizes opportunistic investing, focusing on the best current investments for the overall portfolio while adhering to the portfolio's risk budget. **Kristaps Līcis**, CAIA
3:30 PM	**Panel: Navigating Risk in Private Markets** This session examines private investment risk modeling across asset classes like Private Equity, Credit, Infrastructure, and Real Estate, highlighting method challenges, data limits, and stakeholder dynamics. **Kabil Jaâ,** PSP investments and **Ranjan Bhaduri,** Bodhi Research Group

CAASA ANNUAL CONFERENCE 2024
WEDNESDAY, NOV 13TH AGENDA

3:50 PM	**Panel: First Mover Advantage** This panel provides a multi-dimensional perspective on emerging managers, with insights from an allocator specializing in this area, an operational due diligence expert, an executive from a managed account platform, and an industry veteran with extensive experience in the emerging manager space. **Harry Pagel,** HedgeFacts, **Cordell W. Thomas II,** New York State Nurses Association Pension Plan and Benefits Fund, **Kirk Sims,** TRS Investment Management Division, **Hugues Bessette,** Innocap, and **James Burron,** CAASA
4:30 PM	**Reception** Time to make a few more connections and chat about the day
6:00 PM	**End of conference** Until next year!

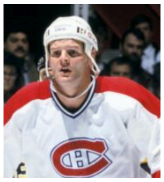
SPEAKER BIOGRAPHIES

Thank you to our many speakers, presenters, and those who added their themes and topics, panel and non-industry speaker ideas, and other invaluable input!

KEYNOTE SPEAKER BIOGRAPHIES

Sebastien Betermier
Associate Professor of Finance, Desautels Faculty of Management
McGill University

Sebastien Betermier is an Associate Professor of Finance at the Desautels Faculty of Management at McGill University, and the Executive Director of the International Centre for Pension Management. His research focuses on the relationship between risk and return, asset allocation, sustainable finance, and the design of sustainable pension systems. He teaches courses on applied investments and pension funds and retirement systems at both the undergraduate and graduate levels. Betermier founded and currently directs the McGill International Portfolio Challenge, the world's largest buy-side university competition focused on sustainability challenges for pension funds and other institutional investors. He is a member of the Research Policy Network on Household Finance at the Center for Economic Policy Research (CEPR), and he also founded and serves as Advisory Board member of the Sustainable Growth Initiative at McGill. Professor Betermier holds a PhD in Finance from the Haas School of Business at the University of California, Berkeley. He was Head of the Finance Area at the Desautels Faculty of Management from 2020-2022 and an Academic Advisor at the Bank of Canada from 2018-2022. Betermier's work appears in top finance journals, and it has featured in the Wall Street Journal, The Economist, Financial Times, and Bloomberg, among others. In 2017, he was named one of the World's Best 40 under 40 Business School Professors by Poets and Quants.



Chris Nilan
Ambassador
Montreal Canadiens

Chris Nilan played 688 National Hockey League (NHL) regular season games as a right-wing for the Montreal Canadiens, New York Rangers, and Boston Bruins between 1980 and 1992. He won the Stanley Cup in 1986 with Montreal. He also played in an All-Star game and holds an impressive 3043 penalty minutes. Today, Chris hosts a very popular podcast as well as being an ambassador of the Montreal Canadiens.

Luc Verville
CIO, Public Markets
Fondaction

Since 2008, Luc Verville has been CIO Public Markets at Fondaction, he is responsible for the funds invested in public markets, Mr. Verville ensures compliance with investment policy and provides guidance to external managers, he adjusts asset mix allocation according to financial market conditions. Coupled with several years of experience in the investment industry, Mr. Verville has excellent knowledge of different asset classes. He sits on several investment committees as an expert. Before joining Fondaction, he worked at CDPQ for 15 years fulfilling different roles within the fixed income market team. he has been also a lecturer for several universities.

Receiving his bachelor's degree from the Université du Québec à Trois-Rivières and a master's degree from the Université of Sherbrooke, Mr. Verville also earned his CFA designation and completed the Montreal Exchange traders' program. A golf enthusiast, he is one of Canada's 100 golf course reviewer for SCOREGolf Magazine.

SPEAKER BIOGRAPHIES

Jean-François Bérubé
Vice President, Quantitative Strategies and Data Science
CDPQ

Jean-François has over 15 years of professional experience in digital technology and quantitative investment. He held various leadership roles at Hexavest and Desjardins International Asset Management before joining CDPQ in January 2022.

As Vice-President, Quantitative Strategies and Data Science, Jean-François is responsible for developing and managing systematic and quantitative investment strategies. He is also responsible for pre- and post-investment analytics on liquid and illiquid CDPQ's portfolios. Lastly, he has the mandate to accelerate and expand the integration of data science into the organization's investment processes.

Jean-François holds a PhD and Master's degree in computer science from University of Montreal (2008 and 2004), as well as a Master's and Bachelor's in Economics from University of Montreal (2000 and 1999). In addition to his experience at Hexavest and Desjardins International Asset Management, Jean-François served as Quantitative Analyst at CDPQ from 2007 to 2009 and was a Research Professional at CIRANO from 2000 to 2003.

Hugues Bessette
Chief Investment Officer
Innocap

Hugues Bessette serves as the Chief Investment Officer at Innocap since 2017. In this role, he leads a global investment team dedicated to empowering asset managers with strategic allocation insights. Hugues is committed to providing allocators with unparalleled access to and oversight of absolute return strategies.

Prior to joining Innocap, Hugues was the Managing Director and Head of Internal Absolute Return at PSP Investments in Montreal from 2004 to 2016. During his tenure, he played a key role in PSP's Public Markets Investment Committee and managed the Public Markets overlay portfolio.

Prior to PSP, he gained valuable experience as a Strategist at Bear Stearns International in London, covering central banks and hedges funds, as a fixed-income portfolio manager at CN Investment, and in the Treasury department of the National Bank of Canada.

Hugues hold a bachelor's degree in Actuarial Sciences and a Master's in Finance (M.Sc) from Laval University as well as a CFA designation.

SPEAKER BIOGRAPHIES

Ranjan Bhaduri
Founder & CEO
Bodhi Research Group

Dr. Ranjan Bhaduri (he/him) is the Founder & CEO of Bodhi Research Group, an advisory and consulting firm dedicated to research and education in the investments industry. Under Dr. Bhaduri's leadership, Bodhi Research Group has served clients on five continents and worked with over a dozen pension funds.

Dr. Bhaduri is a leading voice and recognized authority in shaping best practices of the alternative investments industry. Dr. Bhaduri has 25 years of experience in manager research, portfolio construction, due diligence, structuring, and implementing managed account solutions. At Morgan Stanley, Dr. Bhaduri performed due diligence and played a crucial role in developing customized portfolios of alternative investments. He also served in an advisory capacity at the East-West Center, an American think tank focused on U.S.-Asia-Pacific relations.

Dr. Bhaduri has been a featured speaker at both industry conferences and prestigious educational institutions, educating both entrants and seasoned professionals in the field. He has addressed diverse topics ranging from entrepreneurship strategies to advanced portfolio and risk management techniques. Dr. Bhaduri's academic contributions extend to publishing papers on a variety of topics including liquidity, portfolio construction, managed account platforms, hedge fund strategies, and risk management in esteemed publications.

Dr. Bhaduri holds both the CFA and CAIA charters. Previously, he served on the All About Alpha Editorial Board and held roles such as Executive of the CAIA Chicago Chapter and currently serves as Executive of the CAIA Toronto Chapter. He has also contributed to AIMA Canada as a Board Member, co-chair of the Managed Futures Committee, and member of the Global Research Committee.

Dr. Bhaduri has demonstrated a strong track record of leadership and mentorship. Several of his former analysts and interns have achieved notable success, securing positions at renowned organizations.

SPEAKER BIOGRAPHIES

James Burron
Founding Partner
CAASA

James co-founded CAASA in response to industry support for a Canadian alternatives association to serve all aspects including: hedge / alternative strategies; private lending; private real estate; private equity; plus emerging areas where Canada is a leader such as digital assets / blockchain and robo-advisors.

Prior to CAASA, James was the Chief Operating Officer of AIMA Canada where his team of three worked with 12 committees to produce 50-60 events per annum across Canada, organize 100+ committee meetings, and increase member numbers over his 7-year tenure from 66 to 164 corporate entities.

James also has experience in research and writing for the CAIA Association as well as serving on CAIA's Exam Council and as a grader for the Level II portion of the exam. He also had roles in institutional sales and FoHF structuring in Seoul, South Korea, as a Product Manager at ICICI Wealth Management, and an Investment Advisor at RBC Dominion Securities. He graduated from Simon Fraser University with a BBA (Finance).

Yves Caron
Senior Director, Funds Private MarketS
CDPQ Funds Management

Yves Caron is a Senior Director, Funds Private Markets, at CDPQ Funds Management. Currently focused on private credit, he has experience across liquid and illiquid markets, emerging managers and GP stakes. Prior to CDPQ, he was a portfolio manager at a multi-family office and at a FOHF.

Yves' experience in finance is complemented by knowledge of information technology. He worked as a consultant in IT strategy at Deloitte and founded a digital archiving service. He has a MBA from HEC Montreal and a bachelor of science (honors biochemistry) from McGill University.

SPEAKER BIOGRAPHIES

Lauretta Chame
Senior Associate
IMCO

Lauretta CHAME, CFA is a francophone financial professional with a unique global perspective, having lived, studied, and worked across four countries—Cameroon, France, the USA, and most recently Canada—spanning three continents over the past 18 years. Her interest in foreign languages, including English, German, and Spanish, reflects her dedication in connecting the world through her global insights and cultural fluency.

Lauretta began her career 8 years ago at BNP Paribas in Paris, where she held various roles in both public and private investments markets, including a leadership position. A year ago, she relocated to Toronto, where she currently serves as a Senior Associate in the infrastructure department at IMCO, primarily supporting the deal team and preparing performance reports for clients.

She is a CFA Charterholder and holds a master's degree in Finance. Additionally, she is an active member of the CFA Society Toronto's Institutional Asset Management Committee.

Kevin Craney
Relationship Manager
Milburn Services, LLC – Family Office

Kevin Craney is a seasoned investment professional with extensive experience managing alternative investments, client relationship management, business development, and portfolio management. Currently serving as a Relationship Manager with a single-family office in Charlotte, NC, he is responsible for overseeing investment portfolios for family office clients, conducting ongoing due diligence on investment managers, regularly participating in investment committee meetings, and serving as secretary. Kevin brings a wealth of experience in hedge funds and other alternative investment strategies.

Kevin's career has also involved leadership roles at OASIS Investment Strategies, LLC, where he was an integral part of a team that launched a hedge fund-managed account platform. At OASIS, Kevin was responsible for business development, raising capital from institutions, family offices, and HNW investors. Kevin actively participated in hedge fund due diligence. Kevin has also worked as an investment and derivative consultant, where he led portfolio management, execution of futures trading strategies, risk management initiatives, macro market analysis, client onboarding, and relationship management.

SPEAKER BIOGRAPHIES

Wagner Dada
Managing Director, Systematic Strategies Group, Capital Markets & Factor Investing
CPP Investments

Wagner oversees a global portfolio of systematic absolute return strategies in the macro space focusing on interest rates, currencies, and commodities at CPP Investments. Before his current role, he was previously focused on portfolio construction efforts in the global tactical and asset allocation group.

Prior to joining CPP Investments, Wagner was a Quantitative Portfolio Manager responsible for the development, research and management of a global macro multi-asset systematic strategy at Tudor Investment Corporation.

Wagner holds a PhD degree in Economics from the University of Cambridge. He is a CMT and CFA charterholder.

Jan Ericsson
Director, Master of Management in Finance; Associate Professor, Finance
McGill University

Professor Ericsson joined the Desautels Faculty of Management in the autumn of 1999 with a PhD from the Stockholm School of Economics (1997). A former Marie Curie Fellow at the Catholic University of Louvain, Belgium, he is now an associate professor, Director of the Master of Management in Finance.

Ericsson's current research focuses on risk premia in corporate bond and credit derivative markets, and has been published in the Journal of Finance, Review of Financial Studies, Journal of Financial Economics, Journal of Business, JFQA and others.

At McGill, Professor Ericsson has given derivatives, and fixed income courses at BCOM, MMF, MBA and PhD levels.

At the executive level, Ericsson has spearheaded single- and multi-name credit derivative courses, as well as general seminars on derivatives theory in Montreal, Stockholm, and New York. He has also acted as guest speaker at industry conferences in North America and the Caribbean. Furthermore, Professor Ericsson has carried out consulting projects for a Nordic real estate investment firm, the Swedish National Debt Office, acted as advisor / expert witness to a number of law firms on topics related to derivatives and structured products.

SPEAKER BIOGRAPHIES

Marc Gauthier
University Treasurer and Chief Investment Officer
Concordia University

Mr. Gauthier is responsible for the corporate finances oversight and management of Concordia University, including, for its investments portfolio, the Pension Plan and Intergenerational Fund but as well the University's capital investments, financing and corporate risk portfolios. He has been employed by Concordia University for 34 years and has obtained his CMA and graduated from Finance and Accounting at Concordia University as well as from Queen's Executive Program.

Jim Geoghegan
Deputy Head of Investments
Prime Quadrant

Jim is the Deputy Head of Investments of Prime Quadrant.

Jim has a wealth of experience gained from his 15-year tenure at CPP Investments as well as from his position as a Visiting Researcher at Bodhi Research Group. While at CPP Investments in Toronto and Hong Kong, Jim gained broad and diverse experience across several areas including investment research and due diligence, asset allocation, portfolio construction, financial modeling, relationship management and business planning. A notable highlight of Jim's CPP Investments tenure was his experience building and managing a variety of global investment portfolios, and he was a key contributor to the growth of the firm's emerging market portfolio. Jim's investment experience spans both public and private markets.

Jim received a Bachelor of Arts in Honors Business Administration from the Ivey Business School and holds the CFA charter.

Outside of work, Jim can be found paddleboarding, cycling with his family, or attending Paw Patrol concerts with his young daughters. He has also enjoyed supporting efforts to expand life-saving stem cell donations.

SPEAKER BIOGRAPHIES

Hazlitt Gill
Managing Director, Partnership Portfolios
BCI

Hazlitt Gill joined BCI's Partnership Portfolio team in 2022 and leads the group's absolute return fund program. Prior to joining BCI, Hazlitt spent over 13 years at Wells Fargo Investment Institute, most recently as Senior Vice President and Head of Alternatives Manager Research. Hazlitt also worked as CIO of RLJ Select Investments and Vice President of Alternative Investments at Morgan Stanley Private Wealth Management. Hazlitt has more than 25 years of capital markets experience primarily in alternative investments.

Jeremy Heer
Managing Director, Investment Research and Engagement
University of Illinois Foundation

Jeremy Heer is Managing Director, Investment Research and Engagement at the University of Illinois Foundation. In his role he advances learning, research, and engagement activities within the Investment Office, leading and supporting the Foundation's thesis-driven and outbound sourcing efforts. Jeremy has previously held investment management roles at the University of Chicago, Singer Partners, UBS, and Morgan Stanley, as well as other financial industry roles at Morgan Stanley and Cargill. Jeremy earned an MBA from New York University and a BS from the University of Illinois at Urbana-Champaign. He is a CFA and CAIA charterholder and an active volunteer for both of these communities.

SPEAKER BIOGRAPHIES

Kabil Jaâ
Director of Transversal Risk
PSP Investments

Kabil Jaa has 10+ years of experience in the financial markets, specializing in portfolio and risk management. In his current role as Director of Transversal Risk, Kabil oversees a team dedicated to modeling private and illiquid investments, including Private Equity, Infrastructure, Natural Resources, Real Estate, and Private Credit. His expertise lies in decomposing portfolios into risk factors, identifying risk trends, and quantifying investment liquidity risk at the total fund level.

Throughout his career, Kabil has successfully led numerous projects, demonstrating high levels of interpersonal, analytical, technical, and intuitive skills. He is recognized for his communication, strategic thinking, and problem-solving abilities. His leadership and expertise have been pivotal in driving success and innovation within his team and organization. Kabil holds a Master of Science in Finance from Sherbrooke University.

Loïc Julé
Head of Public Markets, Hedge Funds and Direct Investments Transactions
Richter Family Office

Mr. Loïc Julé has more than 25 years of experience in financial markets, he spent most of his career working for large Canadian pension plans. Mr Julé currently serves as the head of public markets, absolute return and direct investment transactions at Richter Family Office overseeing all investments made through external managers as well as direct and co-investments. Prior to Richter, Mr Julé spent 14 years at PSP Investment where he served as the Managing Director and Head of Capital Markets Alternatives in his last role, overseeing a portfolio composed of an externally managed portfolio of absolute return strategies as well as an internally managed Opportunistic / Special Situations portfolio. Prior to joining PSP Investments, Mr. Julé spent four years at the Caisse de dépôt et placement du Québec (CDPQ) as an Analyst in the Absolute Return group.

Prior to CDPQ, Mr. Julé was a derivatives sales trader at BNP Paribas Equities, France, in Paris. He began his career at the Compagnie Parisienne de Réescompte (CPR) in Paris, working in its brokerage unit.

Mr. Julé earned a Master degree specialized in Financial Engineering from the Institut Supérieur D'Études Financières et d'Ingénierie – Groupe École Supérieure de Commerce de Marseille – France in 1998.

SPEAKER BIOGRAPHIES

Jamy Kallikaden
Managing Director, Portfolio Design & Construction
CPP Investments

Jamy is the head of the Sustainable Design team within the Total Fund Management Department. She is responsible for incorporating climate change into CPP Investment's Strategic Asset Allocation and provides guidance on both public and private investments as a member of CPP Investment's Sustainable Investing Committee. She has more than a decade of experience in energy markets and sustainable finance, having worked in capital markets, trading energy commodities, and value-based investing. Jamy joined CPPIB in 2015, after working on the physical oil and natural gas desk for Macquarie's Energy Markets Division in Houston, Texas. Jamy holds a BA in Chemical and Environmental Engineering from the University of Waterloo.

Guillaume Lavoie
Director, Strategic Asset Allocation
PSP Investments

Guillaume has been serving for over a decade at PSP Investments in various roles in to Total Fund management and asset allocation. Currently, he is responsible for creating mandates and benchmarks for all asset classes and is directly involved in establishing PSP's long-term strategic asset allocation, including the integration of climate considerations. In his functions, he plays a key role in researching and developing of all new asset classes and strategies with the various investment teams.

Kristaps Līcis
Director of Exams
CAIA Association

Kristaps Līcis has served as the Director of Exams at the CAIA Association since 2022 and as the Senior Associate Director of Exams from 2008 until 2022. He works in all areas of the examination process, including, but not limited to, managing CAIA's exam team, item development, exam design, item analysis, and exam delivery. Prior to joining the CAIA Association, Kristaps worked at Alternative Investment Analytics as a senior analyst.

SPEAKER BIOGRAPHIES

Angela Lin-Reeve
Senior Portfolio Manager, External Managers Program
HOOPP

Angela Lin-Reeve joined the Investment Management Team at Healthcare of Ontario Pension Plan (HOOPP) in 2023 as Senior Portfolio Manager, External Manager Program. In this role, Angela oversees a portfolio of absolute return strategies that intends to complement HOOPP's internal trading capabilities and provides exposure to a wide range of strategies and asset classes.

Prior to joining HOOPP, Angela held the position of Director, Pension Investments at Royal Bank of Canada (RBC) where she managed external manager portfolios in public and private equities, infrastructure, and hedge funds.
Angela began her career at Russell Investments, taking on increasingly senior roles as Portfolio Analyst, Associate PM and Director, Product Development and Strategy.

Angela holds a Bachelor of Commerce from McMaster University and the Chartered Financial Analyst (CFA) designation.

Derek Lublin
Senior Director, Global Alpha, External Managers
PSP Investments

Derek Lublin is Senior Director in the Global Alpha group at the Public Sector Pension Investment Board (PSP Investments). Based in New York, Mr. Lublin's responsibilities are focused on external manager investments, including fund and special investment opportunities. Mr. Lublin identifies and evaluates managers, strategies, and co-investment opportunities globally across asset classes, and designs portfolios to meet the organization's return, risk, and liquidity objectives.

Prior to joining PSP Investments, Mr. Lublin was a Portfolio Manager in the Absolute Return Strategies group at General Motors Asset Management. His primary responsibilities included asset allocation and manager research, selection, and oversight for various General Motors entities.

Mr. Lublin has previous experience with Tribeca Global Management and Citigroup Alternative Investments, a multi strategy hedge fund where he was responsible for manager evaluation, risk management and portfolio construction. Prior to Citigroup, Mr. Lublin founded the investment advisory firm DML Capital Management.

Mr. Lublin received his undergraduate degree from University of Michigan and earned his MBA from Columbia Business School.

SPEAKER BIOGRAPHIES

Steve Mahoney
Chief Investment Officer
NS Pension

Steve Mahoney was appointed NS Pension's Chief Investment Officer (CIO) on April 1, 2022. As CIO, Steve is responsible for the team managing the investments of the Teachers' Pension Plan and the Public Service Superannuation Plan.

Steve was born and raised in Nova Scotia. His career started with the Maritime Life Assurance Company as an Investment and Actuarial Analyst. He then moved on to Keel Capital as a Risk Manager and then to the Halifax Regional Municipality Pension Plan also as a Risk Manager. He spent six years at Morneau Shepell (now Telus Health) as a Partner in their investment and risk management consulting division. Prior to NS Pension, Mr. Mahoney was Vice President of Institutional Sales with Connor, Clark & Lunn Financial Group in Toronto.

Steve's education includes a Bachelor of Science (Mathematics) degree from Mount Allison University and a Bachelor of Education degree from St. Francis Xavier University. He also holds several professional designations including Chartered Financial Analyst (CFA), Chartered Alternative Investment Analyst (CAIA), Fellow of the Society of Actuaries (FSA), and Professional Risk Manager (PRM).

Nirupa Muthurajah
Associate Director, Public Equity
University Pension Plan

As Associate Director, Public Equity at University Pension Plan, Nirupa leads the construction and oversight of the Active Public Equity portfolio for UPP. In her role, she is responsible for research and due diligence of long-only equity managers as well as the long-term strategic direction of the Active Public Equity Portfolio.

Nirupa's career spans Canada's top pension plans, Ontario Teachers' Pension Plan and CPP Investments, as well as a prominent Canadian Family Office. Her experience encompasses diverse roles across private and public markets, covering various asset classes. She has helped build and maintain global systematic investment strategies, structure hedge fund and fixed income external manager portfolios, spent time in Hong Kong supporting direct lending activities to companies in the Asia-Pac region and has experience investing in early to late-stage private equity as well as public investment strategies.

Nirupa holds an Honours Bachelor of Arts in Financial Mathematics with Business Administration from Wilfrid Laurier University. Outside of her professional pursuits, Nirupa enjoys spending time with her family, including her two young daughters, and is a proud ambassador for the Princess Margaret Cancer Foundation, an organization dear to her heart.

SPEAKER BIOGRAPHIES

Harry Pagel
Senior Vice President
HedgeFacts

Harry Pagel serves as the Senior Vice President at HedgeFacts, bringing with him an extensive career spanning nearly three decades in the financial industry. His journey commenced on the iconic Wall Street, where he gained invaluable experience at Morgan Stanley & Co., Inc., specializing in Middle Market Institutional Equity Sales.

Harry's professional trajectory includes over a decade spent at SCT Capital Management, a trailblazing machine learning hedge fund, where he held the esteemed position of Managing Director in Sales & Trading. In this capacity, he not only spearheaded business development efforts but also assumed responsibility for overseeing the firm's execution trading operations, showcasing his multifaceted expertise.

Throughout his illustrious career, Harry has made notable contributions to various financial organizations, including Typhon Capital Management and Oppenheimer & Co. He also embarked on an entrepreneurial journey that lasted for four years, co-founding a boutique asset management firm and demonstrating his entrepreneurial spirit and innovative approach to the industry. Harry Pagel's wealth of experience, coupled with his proven track record in sales, trading, and business development, positions him as a seasoned leader in the financial sector. His enduring commitment to the field and diverse professional background make him a valuable asset to HedgeFacts and a respected figure in the financial community.

Sandy Poiré
Senior Investment Officer
CN Investment Division

Sandy Poiré is a Senior Investment Officer for the absolute return team at the CN Investment Division. In her current role she is responsible for the allocation to external managers for the hedge fund portfolio. Sandy joined the Division in 2011 and was initially responsible for the industrials sector for the Divisions' European, Asia-Pacific and Emerging Markets equity portfolios.

Sandy graduated from the John Molson School of Business (Concordia University) with a Bachelor of Commerce degree and was the Valedictorian of her graduating class. She also received the Calvin Potter Fellowship from Concordia's Kenneth Woods Portfolio Management Program. Sandy is a CFA charterholder since 2014 and completed a Master's in Business Administration at Queen's University in 2017.

Sandy is Vice President and chair of the governance committee of the board of CFA Montreal and is also an ambassador for Fillactive, an organization aiming to promote physical activities to young Canadian women.

SPEAKER BIOGRAPHIES

Maria Clara Rendon
Senior Director, Responsible Investing
University Pension Plan Ontario (UPP)

Maria Clara Rendon is a noted responsible investing specialist, with more than 12 years of experience in the assessment and management of environmental, social and governance (ESG) factors in a wide variety of industries. Her work focuses on the implementation of responsible investing practices by asset owners and managers in both North America and Latin America.

As Senior Director, Responsible Investing at University Pension Plan Ontario (UPP), Maria Clara supports the development and execution of UPP's Responsible Investing (RI) strategy. She works closely with internal and external partners to ensure a seamless integration of ESG factors into UPP's investment process and implementation of stewardship practices on behalf of over 37,000 UPP members.

Maria Clara holds a Bachelor of Science in Biological Engineering from the National University of Colombia and earned a Master of Science, Sustainability Management from Columbia University in New York, NY.

Louis-Philippe Roy
Director of Investments
Joddes

Louis-Philippe Roy joined Joddes in August 2021 as Director of Investments. He has spent over 15 years in various roles that span private markets due diligence, portfolio management, risk management and sell-side trading at various Canadian institutions. In his current role, he is responsible for the day-to-day management of the investment portfolio, including asset allocation as well as manager sourcing in both public and private markets.

Prior to joining Joddes, Louis-Philippe worked at TD Asset Management Inc. (TDAM). As part of the Quantitative Equity team, he co-managed TDAM's quantitative equity portfolios, with a focus on the systematic alpha mandates.

Before joining TDAM, Louis-Philippe worked as an Associate Director of Proprietary Risk & Investments for a large Canadian financial institution, where he was responsible for trading, hedging, and risk management.

Louis-Philippe holds a Master of Financial Economics from the University of Toronto and a Bachelor of Arts in Economics from the University of Western Ontario. He also holds the Chartered Investment Manager designation.

SPEAKER BIOGRAPHIES

Zarqaa Shaikh
Managing Director, Completion Portfolio Strategies, Total Portfolio Management
OPTrust

Zarqaa Shaikh is Managing Director of Completion Portfolio Strategies in the Total Portfolio Management (TPM) group at OPTrust. With net assets of $25 billion, OPTrust invests and manages the OPSEU Pension Plan, a defined benefit plan with over 110,000 active members and retirees.

In her role, Zarqaa is responsible for co-leading the public markets portfolio to complete the Total Fund's risk factor exposure and enhance the Fund's risk and return profile. In addition, Zarqaa provides strategic direction on the Plan's externally managed public-market investments. Zarqaa also manages several venture capital relationships within TPM's technology incubation portfolio.

Before joining OPTrust in September 2017, Zarqaa spent close to four years working in private equity at Starling Group, a family office in Dubai, and allocating capital across North America, Europe and Asia.

Zarqaa holds an MBA from the Rotman School of Management, University of Toronto. She is also a CFA Charterholder.

John Simitzis
Senior Director, Pension Fund Investments
Kruger Inc.

John Simitzis is Senior Director of Pension fund investments at Kruger Inc. In this capacity he manages the investment team and reports to the different stakeholders such as Management, the Investment Committee, the Public Board of Directors as well as representatives of the 16 underlying defined benefit pension plans. In his 12 years at the firm, he previously oversaw the Hedge Fund allocation and built up the non-IG credit and lending portfolio (fixed income alternative).

He also ran an equity long short portfolio and helped develop a large-scale Bitcoin mining operation for Kruger Inc.

John holds an M.Sc. in Financial Economics from HEC Montreal.
He taught a Bachelor's degree derivatives class at HEC Montreal as a lecturer in 2016.

SPEAKER BIOGRAPHIES

Kirk Sims
Managing Director of Emerging Managers Program
TRS Investment Management Division

Kirk Sims heads TRS' Emerging Manager Program. Since being established in 2005, TRS has committed $5.9 billion to one of the largest programs of its kind. An additional $4.6 billion has been invested directly with EM Program graduates. Each graduate was selected as a result of consistent outperformance among a group of more than 218 EM managers.

Sims joined the Teacher Retirement System of Texas on March 1, 2019. Before joining Texas Teachers, he was a Senior Investment Officer for the Teachers' Retirement System of the State of Illinois. Sims had oversight and management responsibility of TRS's Emerging Manager Program, a $750 million evergreen pool of capital designed to identify and invest in emerging investment managers across all asset classes.

Prior, Sims worked at Prudential Retirement where he was responsible for a manager of manager's retirement platform as well as an open architecture investment platform. He also has a background in asset management and has held various positions with both large and small asset managers.
Sims is a CFA charter holder and holds a Masters in Business Administration from the Columbia University Graduate School of Business. He received a Bachelor of Business Administration from Howard University in Washington, DC.

Shael Soberano
Chief Investment Officer
Sharno Group Inc.

Shael Soberano, CFA, is the Chief Investment Officer of Sharno Group, a privately owned independent principal investment group and family office focused on identifying strategic, value-add investment opportunities across a wide range of traditional and alternative asset classes and strategies.

Shael is also the President & CEO, Portfolio Manager & Chief Compliance Officer of Sharno Capital Corporation, a registered Exempt Market Dealer and Portfolio Manager with the Ontario Securities Commission, and distributes securities in Ontario to eligible Accredited Investors.

Prior to Sharno Group, Shael Soberano was Vice President, Senior Analyst at Vision Capital Corporation, a leading Toronto-based Hedge Fund manager focused on publicly traded real estate related securities. Shael first joined Vision Capital as an Analyst in 2009, shortly after its inception. He was promoted to Vice President, Senior Analyst in 2014, and was registered as an Advising Representative with the Ontario Securities Commission in 2017. With a wide range of roles spanning both business development and investment management initiatives, Shael's contributions were integral in growing Vision Capital's assets under management and contributed to its award-winning risk-adjusted performance over that period.

Shael is a CFA Charterholder and completed the Bachelor of Management and Organizational Studies Honours Degree with a Specialization in Finance at the University of Western Ontario. Shael completed the Partners, Directors, and Senior Officers (PDO) Course in 2019 and the Canadian Securities Course (CSC) in 2010, provided by the Canadian Securities Institute (CSI).

SPEAKER BIOGRAPHIES

Pierre-Philippe Ste-Marie
Visiting Researcher
Bodhi Research Group

Pierre-Philippe Ste-Marie has 25 years of experience in the financial industry working with fixed income and cross asset absolute returns teams. He has initiated and unwound absolute returns and indexed portfolios and managed Canadian, US and European cross asset exposure levered and unlevered as a team leader (CEO, CIO) as well as a portfolio manager. Pierre-Philippe joined the Bodhi Research Group in 2022.

Pierre-Philippe obtained a Joint Honours in Economics and Finance with a minor in Mathematics from McGill University and a Master of Science in Computational Finance from Carnegie Mellon University.

Jason Taylor
Founder & CEO
Climate Finance Advisors

Jason Taylor is a capital markets professional with over 20 years of experience and founder of Climate Finance Advisors a boutique sustainable investing and environmental finance firm. In recent years he led the development of the sustainable finance strategy for two Canadian banks working in close collaboration with groups across the bank and capital markets. A frequent conference panelist and public speaker covering topics ranging from transition finance, taxonomies, sustainable finance regulation, Jason has also participated in a number industry standard setting workstreams to accelerate the mainstreaming of sustainable finance in Canada.

He is an advocate for using the power of capital to influence systemic change and contribute to building just, faire, and resilient communities. Experienced in ESG integration, thematic investing, and sustainable investing, his work focuses on crowding-in capital to shrink the funding gap in a financially efficient manner. He completed an MBA focused in sustainability, strategy, and innovation management at McGill/HEC Montreal, where he was named to the Poets & Quants 2019 100 best & Brightest list. He has completed certificate programs on topics ranging from ESG reporting, ESG integration, climate finance, GHG accounting, and energy innovation. He is a CFA and CAIA charterholder. His recent volunteering experience relates to mentoring student-athletes in the Parcours Leadership Carabins program at the University of Montreal founded by Robert Dutton, through the McConnel Foundation’s Solutions Finance Accelerator in 2020, and as a board and investment committee member of the Foundation of Greater Montreal.

SPEAKER BIOGRAPHIES

Cordell W. Thomas II
Director of Operations
New York State Nurses Association Pension Plan and Benefits Fund

Cordell is the Director of Operations at the New York State Nurses Association (NYSNA) Pension Plan and Benefits Fund. He is responsible for leading operational due diligence reviews and broader operations functions within NYSNA.

Prior to NYSNA, Cordell served within General Motors Asset Management's (GMAM) Enterprise Risk Management team; and was responsible for leading operational due diligence reviews on both alternative and traditional asset managers within GM's Defined Benefit and Defined Contribution plans across the US, Canada, Belgium, and the UK.

Prior to GMAM, Cordell worked at Mercer Sentinel, Mercer Investments' operational due diligence consulting group. While at Mercer Sentinel, Cordell performed operational due diligence on alternative and traditional asset managers for both external and internal clients.

During his over 20 years' experience in the asset management industry, Cordell has served in various roles within reputable firms including Citco Fund Services, Société Générale and BNY Mellon Wealth Management. He has worked with both alternative and traditional asset managers of various sizes and geographic locations including North America, Europe, and Asia.

Philippe Trahan
ILS Institutional Investor

Philippe Trahan is one of the longest-tenured ILS institutional investors, having developed and overseen ILS portfolio for Ontario Teachers' Pension Plan (OTPP) between 2007 and February 2024. During that time, he built and oversaw one of the largest and most diverse ILS portfolios, with US$3.5B assets invested across Natural Catastrophe, Specialty, Runoff and Life strategies. He backed numerous innovations aimed at developing the ILS marketplace, notably being the first London Bridge investor, the first ILS investor active in cyber, casualty, runoff and nuclear risks. Prior to OTPP, Philippe spent five years at Aon Re Canada in actuarial and broking roles. Philippe is involved in a number of cross-industry initiatives, including the Sustainable Financial Action Council, the United Nation's Climate Insurance-Linked Resilient Infrastructure Financing and the SBAI's ILS Working Group. Philippe is a Fellow of the Casualty Actuarial Society, of the Canadian Institute of Actuaries and of the Institute of Corporate Directors..

SPEAKER BIOGRAPHIES

Niall Whelan
Risk Executive
Bodhi Research Group

Niall Whelan is a risk executive with over twenty years experience implementing new and emerging industry practices and regulations. He is a trusted change agent, experienced at leading complex cross-functional initiatives. Areas of specialisation include climate scenario modelling, enterprise risk, enterprise stress testing, credit modelling for IFRS 9 and CECL, and models for market and counterparty credit risk. Niall is a thought leader who has presented in industry forums, has led training sessions, has published peer-reviewed papers, and teaches the next generation of risk leaders.

He has been a trusted mentor and coach for numerous individuals throughout his career, many of whom are now in senior roles across the industry. Niall coordinates the risk course at the Master's of Mathematical Finance at the University of Toronto as well as serving on the academic advisory board of the Masters of Quantitative Finance at the University of Waterloo.

Prior to joining forces with Bodhi Research Group, Niall spent over 20 years at the Bank of Nova Scotia leading teams involved in various aspects of risk. Previously he was an academic researcher, investigating the boundary between classical and quantum physics. He is the author of dozens of research papers which have garnered thousands of citations. His research took him to leading research institutes in Copenhagen and Paris.

He holds a PhD in theoretical physics from Yale University.

Vincent Zhou
Portfolio Manager, External Manager Selection
Redjay Asset Management

Vincent is a portfolio manager at Redjay Asset Management, a spin-out asset management firm from a Toronto based single family office. As a PM, he's responsible for portfolio construction and manager selection for Redjay's external funds program. Prior to joining Redjay in 2021, Vincent was a director at Alberta Teachers' Retirement Fund where he was responsible for manager selection for the $2B absolute return program.

Vincent has a Mathematics degree from University of Waterloo. He's also a CFA Charter holder.

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METORI
Capital Management

Metori, a pure-play quantitative asset manager

Metori is a quantitative fund manager headquartered in Paris, with offices in the USA and China. The company brings together seasoned professionals in capital markets, mathematics, IT engineering and quantitative investing. Its founders have an average of 20 years of experience in research and finance.

INDEPENDENT Privately owned, based in Paris with over $690 Million AuM

PURE PLAYER Specialized in Managed Futures

SCIENTIFIC Research-driven systematic investment process

INNOVATIVE Innovation and technology at the heart of our investment strategy

SCIENTIFIC APPROACH TO PORTFOLIO MANAGEMENT

Metori has developed a differentiated systematic trend following model, using statistical inference framework. We combine academic findings and empirical analysis to estimate the principal components driving market trends.

FOCUS ON MARKET DYNAMICS

Our investment philosophy consists in running a research-driven, disciplined process to derive valuable information from price data. Rather than trying to outsmart millions of market participants, we analyze large datasets to identify the direction in which market forces drive asset prices, to take positions accordingly.

"*We welcome you to the Annual CAASA Conference and look forward to meeting you*." **Michel SERIEYSSOL**, Head of Investor Relations (Americas).
T: +1 609 402 4061 E: michel.serieyssol@metori.com

Metori Capital Management is a société par actions simplifiée registered in France with its registered office at 9 rue de la Paix, 75002 Paris (RCS Paris 853 656 541). Metori is authorized and regulated by the Autorité des Marchés Financiers ("AMF") in France (reference no. GP-17000002, effective since 6 Feb. 2017). Metori is registered as a CTA and CPO with the Commodity Futures Trading Commission ("CFTC") and a member of the National Futures Association ("NFA") in the USA (NFA ID 0501245). Metori holds a QFII (Qualified Foreign Institutional Investor) license in China (license n° F2021FRF117 dated 11 January 2022).

SAVE THE DATES
CAASA CONFERENCES – 2025

Flagship Conferences

FAMILY OFFICE SUMMIT — **TORONTO** *April 23-24, 2025*

An alternative conference designed for Single Family Offices, Multi-Family Offices, and Retail Advisors

CAASA ANNUAL CONFERENCE — **MONTRÉAL** *November 4-5, 2025*

This conference brings institutional investors from across the globe focusing on key issues facing investors and managers in Canada and elsewhere.

Thematic Conferences

WEALTH MANAGERS' FORUM — **TORONTO** *March 27, 2025*

All encompassing alternative conference designed for **Retail Advisors**

DIGITAL ASSETS DAY — **TORONTO** *September 17, 2025*

This conference will bring together managers, service providers, and global allocators in the real assets and lending space.

CAASA ALTERNATIVE PERSPECTIVES: PRIVATE MARKETS FORUM — **TORONTO** *September 18, 2025*

This conference will bring together managers, service providers, and global allocators in the real assets and lending space.

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Wilshire

For more information on CAASA membership, initiatives, and events please contact:

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