

Post Conference Report

CAASA ANNUAL CONFERENCE 2025

November 04 – 05, 2025 • Hôtel William Gray, Montréal

CAASA Annual Conference 2025 | Contact us at +1 (647) 953-0737 or paul@caasa.ca



CAASA
CANADIAN ASSOCIATION OF
ALTERNATIVE STRATEGIES & ASSETS

EDUCATIONAL PARTNER



Overview

CAASA Annual Conference (CAC) is our flagship, premier, and most coveted conference.

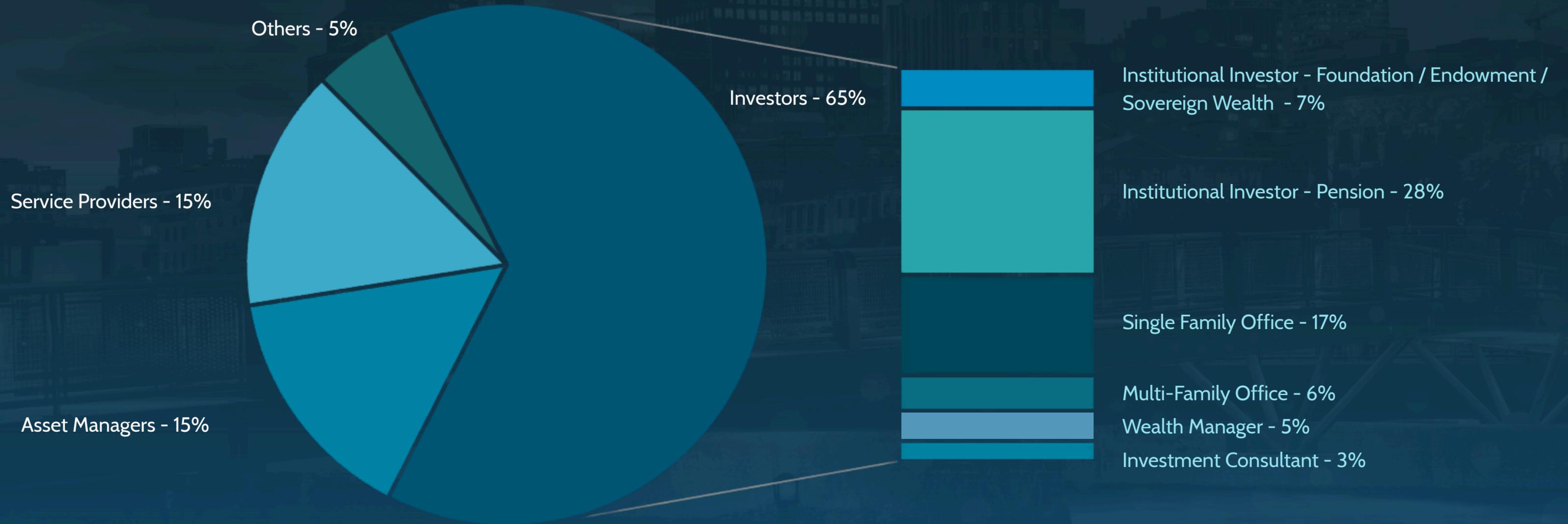
Presented in partnership with Bodhi Research Group, our founding educational partner for the CAC series, the conference brought together speakers and participants from private and public pension plans, sovereign wealth funds, single and multi-family offices, consulting firms, investment dealers, Canadian and global investment management houses, and affiliated service providers. Panels and break-out sessions focused on key issues facing investors and managers in Canada and elsewhere including structuring, legal & tax issues, IT and operational areas, and investments – including: hedge funds, CTAs, private equity, private lending, real estate, infrastructure, and crypto-assets/blockchain-related investments.

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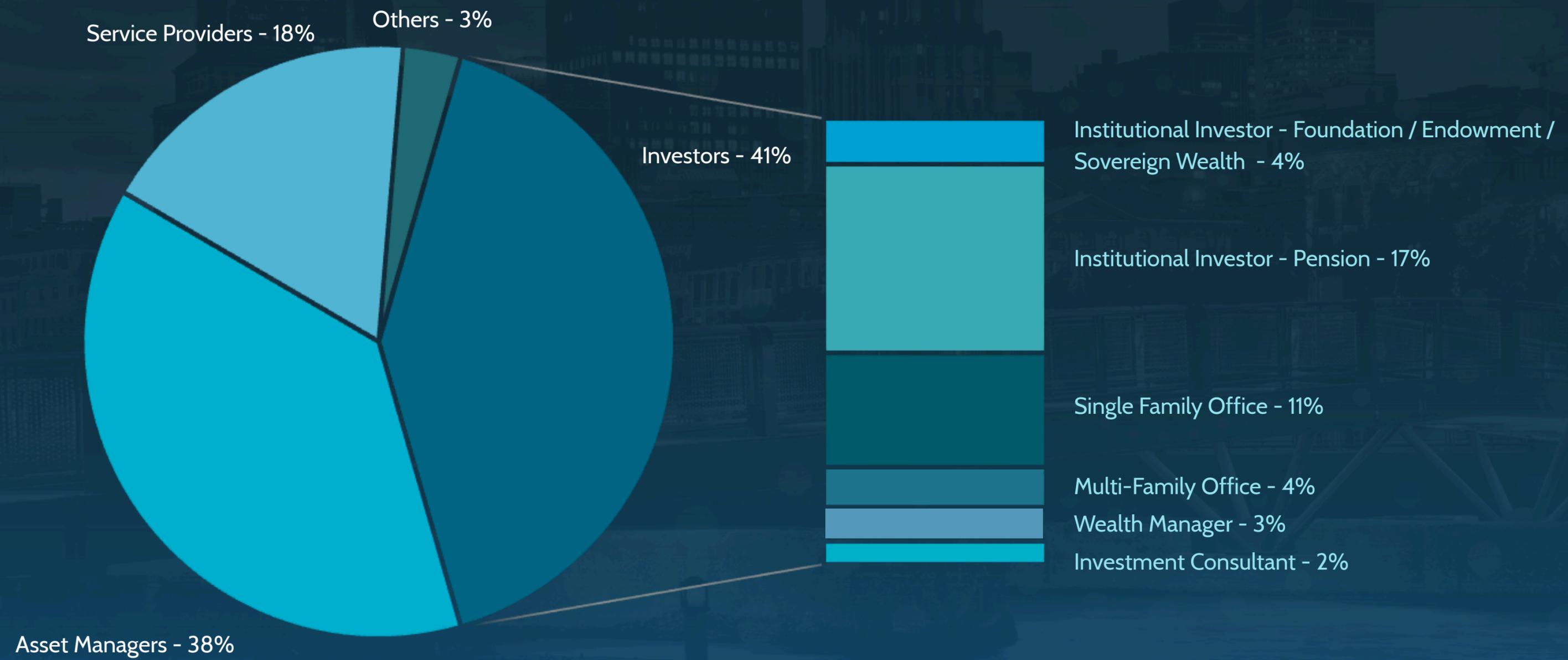
2025 Conference Stats - Day 1

DAY 1 - 120 DELEGATES
EXCLUSIVE TO SPEAKERS, SPONSORS, AND INVESTORS



2025 Conference Stats - Day 2

DAY 2 - 190 DELEGATES
OPEN TO ALL REGISTERED DELEGATES



2025 SPEAKERS



Safiya Bannister



Ranjan Bhaduri

*Founder & CEO
Bodhi Research Group*



Armeen Bhesania

*Senior Manager, Due Diligence &
Advisory
Ontario Teachers' Pension Plan*



Kevin Blank

*Senior Analyst
State of Wisconsin Investment
Board*



Bill Bobey

*Managing Director, Portfolio
Construction and Risk, Capital
Markets and Factor Investing
CPP Investments*



Patrice Boucher

*Vice President and Chief
Investment Officer
Lucie and André Chagnon
Foundation*



James Burron

*Founding Partner
CAASA*



Tishawna Clyburn

*Investment Vice President, Head of
Operational Due Diligence
Prudential Select Strategies*



Wagner Dada

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



Mohamed Farid

*Head of Absolute Return
Strategies
World Bank Pension Fund*



Greg Frank

*Director, Model Validation
Ontario Teachers'
Pension Plan*



Pierre Gilbert

*Vice President, Head of Public
Markets
Bimcor*



Marie Gruttadauria

*Senior Advisor, Geopolitical
Analysis
La Caisse*



Richard Iwuc

*Portfolio Manager
University of Alberta*



Vincent Jacob-Goudreau

*Managing Director, Strategic Asset
Allocation
PSP Investment*



Shankar Kamath

*Director, Partnership
Portfolio
BCI*



Andrea Kilibarda

*Co-Founder, Head of Client
Delivery and Impact
Climate Finance Advisors*



Wayne Kozun

*Co-Chief Investment Officer
Forthlane Partners*



Louis L'Ahelec

*Junior Analyst
Bodhi Research Group*



Kristaps Līcis

*Director of Exams
CAIA Association*



Angela Lin-Reeve

*Senior Portfolio Manager,
External Managers Program
Healthcare of Ontario Pension
Plan*



2025 SPEAKERS



Fangyi Liu

Director, Manager Selection
UBC Investment Management



Richard Macklem

Portfolio Manager
CPP Investments



Nirupa Muthurajah

*Director, Equity Strategies Lead,
Active Public Markets*
University Pension Plan



Scott Radke

*Chief Executive Officer and Co-
Chief Investment Officer*
New Holland Capital (NHC)



David Ross

*Senior Managing Director,
Total Portfolio Management*
OPTrust



Wassim Sakka

Senior Vice President
Wilshire



Marjorie Skolnik

Managing Director
CI Coriel Capital Inc.



Adam Smalley

Managing Director
FCC Capital



Greg Soucy

Retired
Canadian Armed Forces



Pierre-Philippe Ste-Marie

Managing Director
Investment Research
Bodhi Research Group



Cordell W. Thomas II

Director of Operations
New York State Nurses
Association Pension Plan
and Benefits Fund



Nicolas Vincent

External Deputy Governor
Bank of Canada



Justin Young

Director of Investments
MEMCO: Multilateral
Endowment Management
Company



Jingyan Elaine Yuan

*Professor & Director of Graduate
Studies*
University of Illinois at Chicago



DAY 1 - SESSIONS

- Lunch Keynote – Portfolio Diversification beyond the 60-40 Portfolio

Panelists : **Wayne Kozun**, Forthlane Partners

- Total Portfolio Management – From Vision to Execution: Case Study of OPTrust

Panelists : **David Ross**, OPTrust, **Ranjan Bhaduri**, Bodhi Research Group

- The Next 25 Year

Panelists : **Pierre-Philippe Ste-Marie**, Bodhi Research Group

- First Mover Advantage

Panelists : **Ranjan Bhaduri**, Bodhi Research Group, **Richard Macklem**, CPP Investments

- Top of the House: Asset Allocation – Challenges & Opportunities

Panelists : **Pierre-Philippe Ste-Marie**, Bodhi Research Group
Vincent Jacob-Goudreau, PSP Investments, **Mohamed Farid**, World Bank Pension Fund, **Pierre Gilbert**, Bimcor Inc



DAY 1 - SPONSOR TABLE TALKS

1.



3iQ Corp.
Beyond Bitcoin: Active Management & Private Market Opportunities in Digital Assets

2.



Asset Management One USA
An Introduction to Asset Management One USA

3.



Capital Direct Management Ltd.
An Alternative Approach to Fixed Income

4.



Capital Fund Management
Scalable Alpha: Innovations in Data and AI

5.



Omnigence Asset Management
Canadian Farmland: The Untapped Source of Real Alpha

6.



Wilshire
Unlocking Hedge Fund Alpha: Managed Accounts, Portable-Alpha & Treasury Solutions



DAY 2 - SESSIONS

- Next Frontier of Sustainability Integration into the Endowment Model
Panelists : **Andrea Kilibarda**, Climate Finance Advisors
Patrice Boucher, Lucie and André Chagnon Foundation
- Modernizing Qualified Investments: From Consultation to Change
Panelists : **James Burron**, CAASA
- Keynote: How the Bank of Canada makes a Monetary Policy Decision
Panelists : **Deputy Governor Nicolas Vincent**, Bank of Canada
- Finding Alpha – best ideas for 2026
Panelists : **Angela Lin-Reeve**, Healthcare of Ontario Pension Plan, **Nirupa Muthurajah**, University Pension Plan, **Fangyi Liu**, UBC Investment Management, **Richard Iwuc**, University of Alberta
- Balancing Purity and Pragmatism: Practical Approaches to Model Risk Governance
Panelists : **Greg Frank**, Ontario Teachers' Pension Plan



DAY 2 - SESSIONS

- Operational Excellence: The Hidden Driver of Investment Success
Panelists : **Safiya Bannister**, Armeen Bhesania, Ontario Teachers' Pension Plan, **Cordell W. Thomas II**, New York State Nurses Association Pension Plan and Benefits Fund, **Tishawna Clyburn**, Prudential Select Strategies
- Lunch Keynote: The Shifting Landscapes of AI in China and the US
Panelists : **Jingyan Elaine Yuan**, University of Illinois at Chicago
- Keynote: Debrief: Strategic Thinking in High-Stakes Environments
Panelists : James Burron, CAASA, Greg Soucy, Canadian Armed Forces (Retired)
- Geopolitics and Ramifications for Portfolio Management
Panelists : **Marie Gruttadauria**, La Caisse, **Bill Bobey**, CPP Investments



DAY 2 - SESSIONS

- Systematic Strategies and the Pursuit of Alpha
Panelists : **Wassim Sakka**, Wilshire, **Kevin Blank**, State of Wisconsin Investment Board, **Wagner Dada**, CPP Investments, **Scott Radke**, New Holland Capital (NHC)
- Perspectives on Private Matters
Panelists : **Shankar Kamath**, BCI, **Adam Smalley**, FCC Capital, **Marjorie Skolnik**, CI Coriel Capital Inc., **Justin Young**, MEMCO: Multilateral Endowment Management Company



DAY 2 - SPONSOR TABLE TALKS

1.



iCapital
Facilitating Access to Leading
Managers for Private Wealth Investors

2.



Preqin
Fundraising Update in Canada

3.



RBC Investor Services Trust
Managing Growth and Rising
Operational Complexity

4.



SimCorp
Stress Testing and the Importance of a
Total Portfolio Approach

CONFERENCE PARTICIPANTS

20 Single family offices are not listed publicly.

- 3iQ Corp.
- AE Industrial Partners, LP
- AGAWA Fund Management Inc.
- AGF Capital Partners
- AIMCo
- AllMind AI
- Alvertest Ltd.
- AMF - Autorité des marchés financiers
- AQR Capital Management
- Arch Capital Group
- Ardian
- Area One Farms
- Arthur J. Gallagher
- Asset Management One USA
- Axonic Capital LLC
- BAC Securities
- Bank of Canada
- BCI
- BDO
- Bimcor
- BlackRock
- BMO Global Asset Management

- Bodhi Research Group
- BroadRiver Asset Management LP
- CAIA
- CanFirst Capital Management
- Capital Direct Management Ltd.
- Capital Fund Management (CFM)
- CIBC Mellon
- Citi Private Bank
- City Flats Asset Management
- Climate Finance Advisors
- CMI Financial Group
- CN Investment Division
- Cohen & Company Asset Management
- Concordia University
- Coriel Capital Inc.
- CPP Investments
- Cross Ocean Partners
- Crystalline Management Inc.
- Delbrook Capital
- Dicello Levitt LLP
- Duke Capital Limited
- Durum Capital Inc
- Electra Capital Advisors Ltd
- Evolution Credit Partners
- Evovest inc.
- Farm Credit Capital

- Financial Recovery Technologies
- Fondaction
- Forthlane Partners
- Forum Asset management
- Future Standard
- Healthcare of Ontario Pension Plan
- HEC Montreal Pension
- Hedgefacts International LLP
- HGC Investment Management Inc
- Hydro Québec
- Hydro-Quebec
- iCapital Network
- Innocap
- International Financial Data Services (IFDS)
- Investissement Quebec
- ITE Management
- Keystone Farmland Management
- Kruger Inc Pension
- Kudu Investment Management
- La Caisse
- Lawrence River Capital
- LGT Capital Partners
- Lombard Odier
- Lucie and André Chagnon Foundation
- LuminArx



CONFERENCE PARTICIPANTS

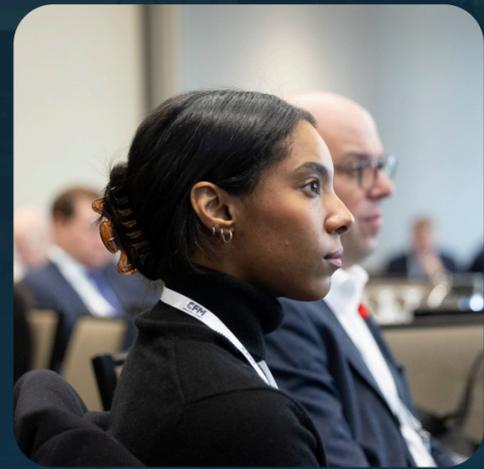
20 Single family offices are not listed publicly.

- MEMCO: Multilateral Endowment Management Company
- Mercan Group
- Mirae Asset Securities (USA) Inc.
- Morgan Stanley
- Nasdaq
- New Holland Capital, LLC
- New York State Nurses Association Pension Plan and Benefits Fund
- Northside Ventures
- Norton Rose Fulbright
- Nymbus Capital
- Oak House Advisers
- Ocree Capital
- Omnigence Asset Management
- Ontario Teachers' Pension Plan
- OPTrust
- P/E Investments
- PenderFund Capital Management
- Perth Advisors LLC
- PlusPlus Capital Management
- Preqin
- Prudential Financial
- PSP Investments
- RBC Investor Services
- Richardson Wealth
- Richter Family Office
- Royal London Asset Management
- Ruffer LLP
- Sage Software
- Sectoral
- SimCorp
- Skyservice Business Aviation
- SS&C Technologies Inc.
- Star Mountain Capital
- State of Wisconsin Investment Board
- TD Asset Management
- Tetrax
- The World Bank
- Theia Partners
- Tikehau Capital Canada
- Trans-Canada Capital
- UBC Investment Management
- Ullico Canada Marketing Services, Inc.
- University of Alberta
- University of Illinois Chicago
- University Pension Plan Ontario
- Wilshire
- YTM Capital Asset Management



Conference Gallery

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