

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.

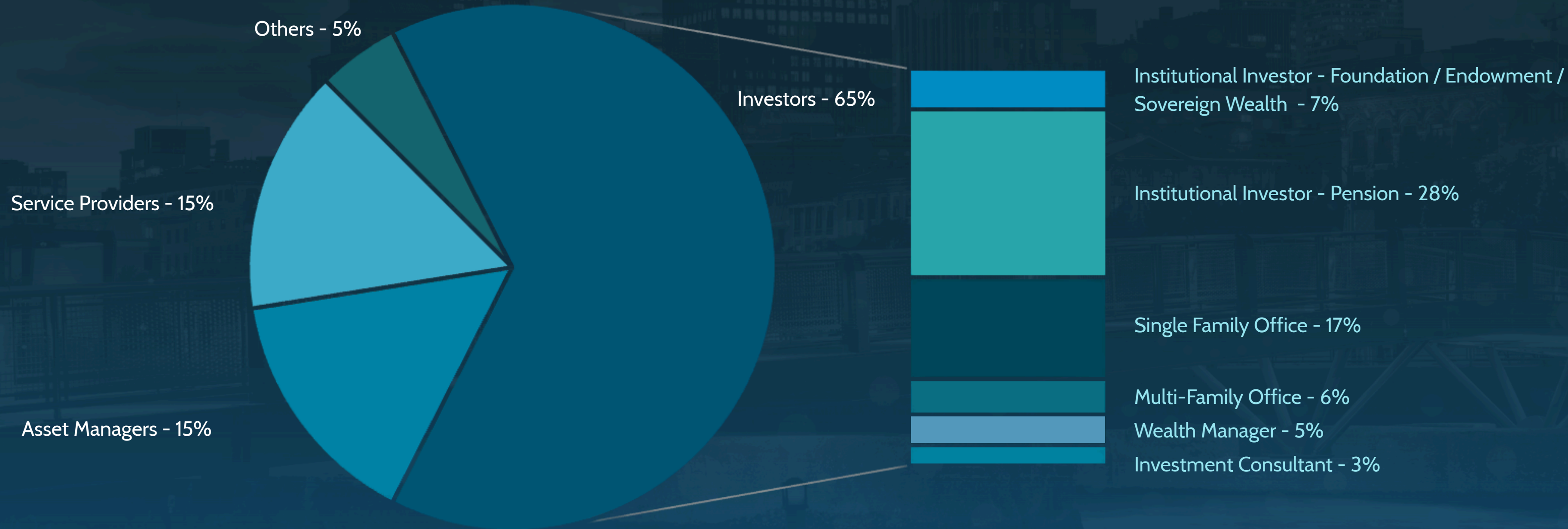
Presented in partnership with Bodhi Research Group, our founding educational partner for the CAC series, the conference brought together speakers and participants from private and public pension plans, sovereign wealth funds, single and multi-family offices, consulting firms, investment dealers, Canadian 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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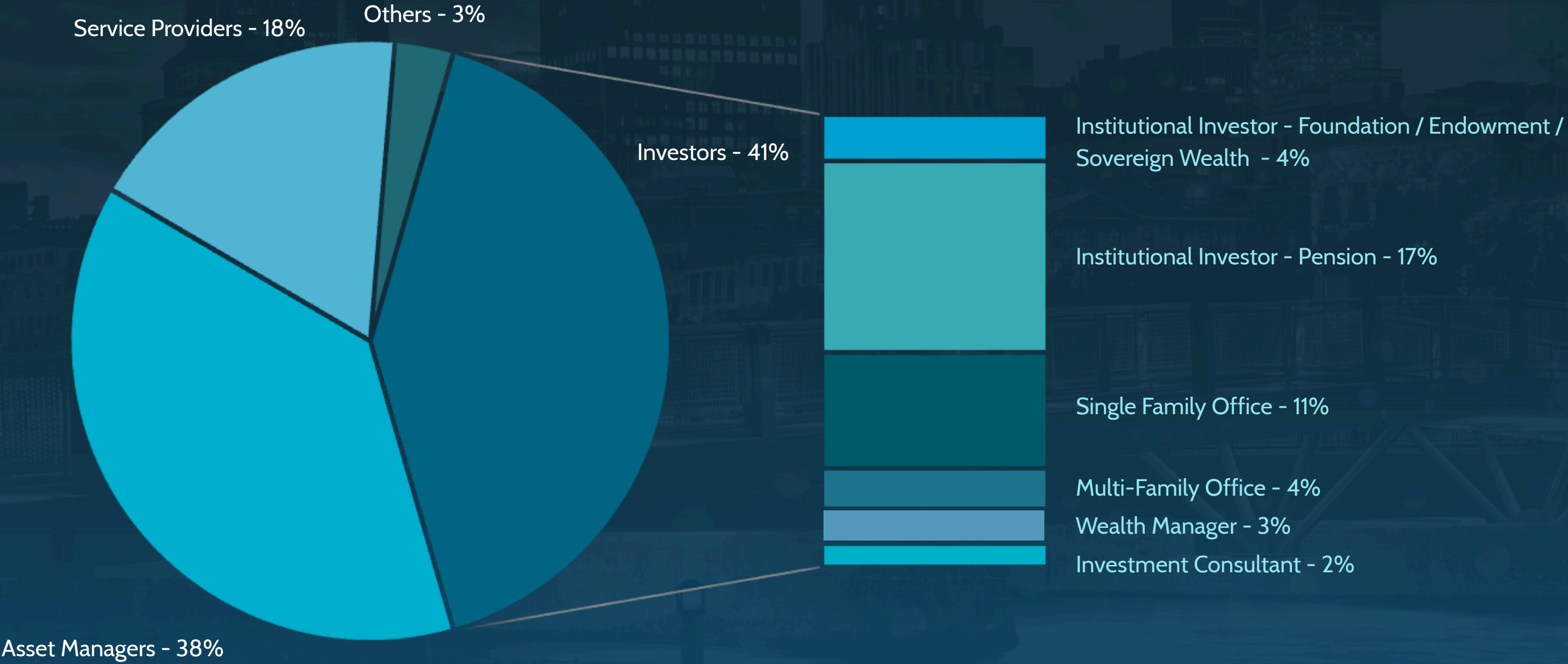
2025 Conference Stats - Day 1

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*



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

4.



Capital Fund Management

Scalable Alpha: Innovations in Data and AI

2.



Asset Management One USA

An Introduction to Asset Management One USA

5.



Omnigence Asset Management

Canadian Farmland: The Untapped Source of Real Alpha

3.



Capital Direct Management Ltd.

An Alternative Approach to Fixed Income

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, Retired and Classified JTF2 team member
- 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
- Altervest 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
- Tetrix
- 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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