Educational Partner :

PRESENTED BY: THE CANADIAN ASSOCIATION OF ALTERNATIVE STRATEGIES & ASSETS

CAASA ANNUAL CONFERENCE 2026

TUESDAY, NOVEMBER 3 & WEDNESDAY, NOVEMBER 4



Conference Title Sponsor

Asset Management One

3iQ

Forging New Paths in Alternative Investing

Founded in 2012, 3iQ is a global leader in digital asset management with a proven track record in innovation, regulatory compliance, and robust risk management, offering institutional-quality investment solutions designed for the modern financial landscape.

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Gain secure, regulated access to leading digital assets through our innovative ETFs.

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WHERE THE INVESTMENT COMMUNITY COMES TOGETHER

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 &The CAASA Annual Conference brings together institutional investors, asset managers and industry leaders from across Canada and around the world for two days of investment education, insightful discussions and meaningful professional connections.

As the flagship event of the Canadian Association of Alternative Strategies & Assets (CAASA), the conference is distinguished by its strong institutional participation and the calibre of its investment-focused programming. Delegates include representatives from leading Canadian pension plans, sovereign wealth funds, foundations, endowments, investment consultants, family offices, and Canadian and international investment management firms.

For investment managers, the conference provides an opportunity to better understand the priorities, investment processes and evolving perspectives of institutional allocators while developing relationships across the investment community. For investors, it offers a forum to exchange ideas with peers, explore investment approaches and engage with experienced professionals across public and private markets.

The conference combines institutional perspectives with smaller-group discussions, one-on-one meetings and networking opportunities, creating an environment where conversations extend beyond the formal program.

A Strong Foundation of Institutional Participation

The conference's two-day format is designed to foster meaningful engagement among institutional investors, asset managers and industry professionals.

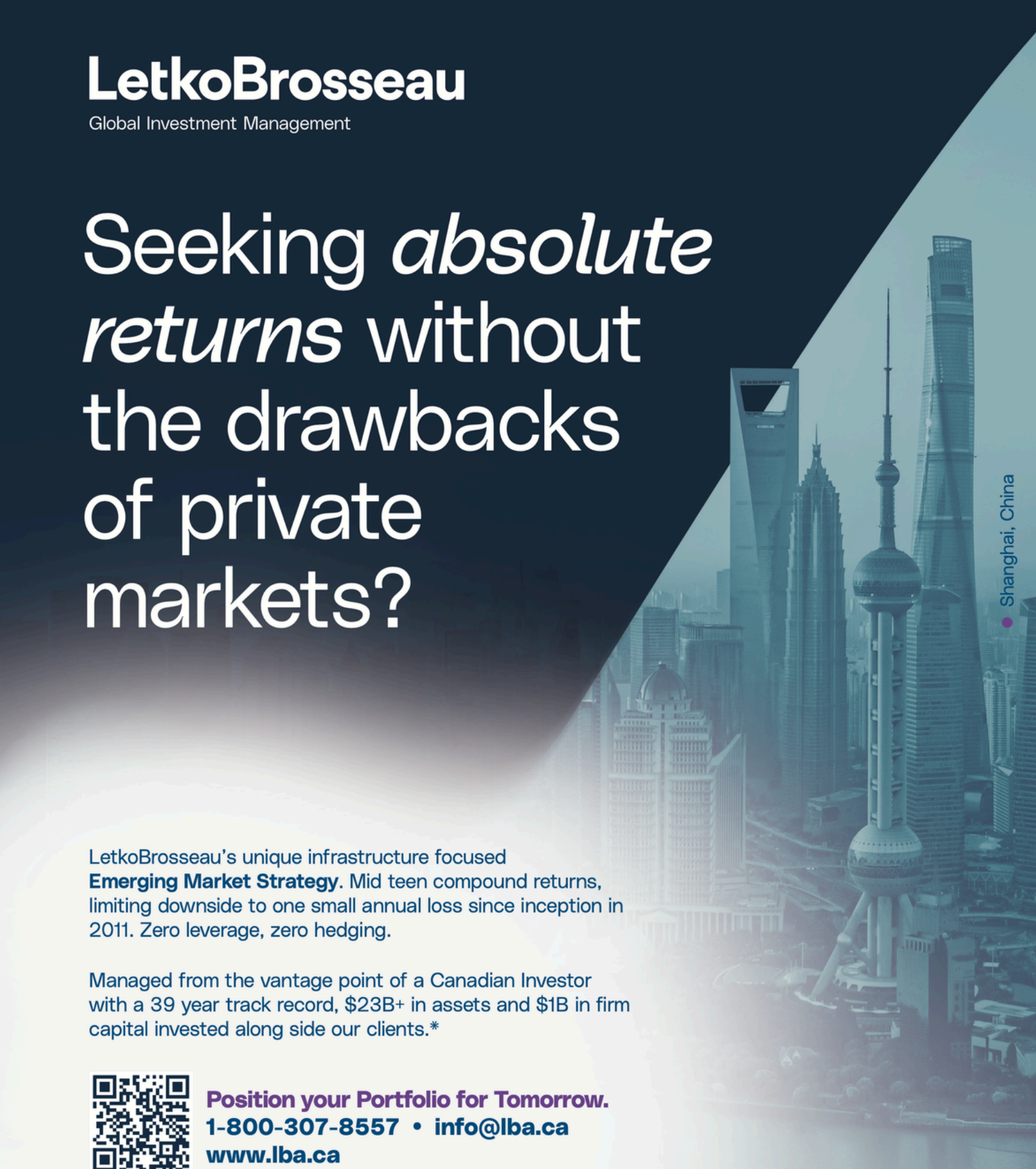
At printing, Day 1, reserved for investors, speakers and sponsors, welcomes **114** delegates, with investors representing **77%** of participants. Day 2 brings together **c200** delegates, with **52%** classified as investors.

The strong presence of leading pension plans and institutional allocators, alongside investment managers and industry specialists, underscores the conference's commitment to high-quality investment education, informed dialogue and valuable professional connections.
Beyond the two-day event, the conference reflects CAASA's broader mission to advance industry knowledge, connect investment professionals and foster lasting relationships across Canada's alternative investment community.

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*As of September 30, 2026






THANK YOU TO OUR CONFERENCE PARTNERS

CAASA gratefully acknowledges the educational partner, sponsors and industry organizations whose support makes the Annual Conference possible.

Their commitment contributes to the continued delivery of high-quality investment education and opportunities for collaboration across Canada's alternative investment community.

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Thank You to Our Title Sponsor

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across traditional and
alternative asset classes

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ABOUT CAASA

CONNECTING CANADA'S ALTERNATIVE INVESTMENT COMMUNITY

The Canadian Association of Alternative Strategies & Assets (CAASA) is a national industry association dedicated to advancing Canada's alternative investment community through education, collaboration and meaningful professional relationships.

Founded in 2018, CAASA brings together institutional investors, family offices, asset managers and service providers across the investment ecosystem. The association has developed strong relationships with leading Canadian pension plans and other institutional allocators, providing a forum for the exchange of investment knowledge, industry perspectives and professional expertise.

A COMMUNITY BUILT AROUND INVESTORS

Institutional investors form an important foundation of CAASA's community. Public and private pension plans, foundations, endowments, sovereign wealth funds, investment consultants and family offices participate in educational events, peer discussions and other initiatives designed to encourage the exchange of ideas.

For asset managers, CAASA provides opportunities to better understand investor priorities, share expertise and establish relationships with investment professionals across Canada and internationally. Service providers contribute specialized knowledge and help address the operational, legal, regulatory and structural considerations facing the industry.

ENGAGEMENT BEYOND THE CONFERENCE

Through conferences, educational programs, networking events, committees and working groups, CAASA facilitates ongoing dialogue across alternative investment strategies and asset classes.

The association also contributes to industry education, thought leadership and discussions on regulatory and policy developments affecting alternative investments.

While firmly rooted in Canada, CAASA maintains an international outlook, helping connect Canadian investors and investment managers with global expertise, perspectives and opportunities.

Eligible institutional investors and family offices participate in CAASA on a complimentary basis, while investment managers and service providers engage through corporate membership.

At its core, CAASA is about creating opportunities for informed discussion, stronger professional relationships and a more connected alternative investment industry.

Learn more: www.caasa.ca

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Best 5 Year Return 3rd Place	Best 10 Year Return 2nd Place



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THE CONFERENCE EXPERIENCE

A CONFERENCE BUILT AROUND MEANINGFUL EXCHANGE

The CAASA Annual Conference is designed to encourage substantive dialogue among institutional investors, investment managers and industry professionals.

Rather than focusing solely on presentations, the conference combines institutional investment education with opportunities for smaller-group discussions, individual meetings and informal networking.

UNDERSTANDING THE INSTITUTIONAL INVESTOR PERSPECTIVE

The conference brings together investment professionals responsible for portfolio construction, asset allocation, manager selection, due diligence and risk management.

For asset managers, these discussions offer valuable insight into how institutional investors evaluate opportunities, construct portfolios and navigate changing market conditions. For allocators, the conference provides a forum to exchange perspectives with peers and engage with investment specialists across public and private markets.

DAY 1: A DISTINCTIVE INSTITUTIONAL EXPERIENCE

The first day of the conference is reserved for eligible investors, speakers and conference sponsors, creating a concentrated environment for institutional dialogue and relationship-building.

The second day welcomes all registered delegates, bringing together the broader CAASA community for educational sessions, industry discussions and networking.

BUILDING RELATIONSHIPS THAT MATTER

CAASA places a strong emphasis on authentic professional interaction. Participants are encouraged to pursue conversations relevant to their interests and objectives, without mandatory meetings or guaranteed investor introductions.

This approach supports meaningful exchanges and relationships built on shared interests, expertise and mutual respect.

These connections are strengthened by CAASA's year-round engagement with the investment community. Through ongoing educational programs, industry initiatives and professional gatherings, the association provides opportunities for conversations initiated at the Annual Conference to develop into lasting relationships and continued collaboration.

CFM

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Systematic quantitative hedge fund

We are a global quantitative and systematic asset management firm based in Paris with staff in New York, London, Shanghai and Toronto. We apply a scientific approach to finance, developing alternative investment strategies and managing over $36bn* for our clients across the globe.

*As of October 2026.



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Capital Fund Management (CFM)

DELEGATE GUIDE

ONE-ON-ONE MEETINGS

Delegates may arrange individual meetings with other registered participants through the conference networking platform. These meetings provide an opportunity to exchange perspectives, discuss professional interests and establish or strengthen industry relationships.

All meeting requests are voluntary and subject to acceptance by the recipient. There is no minimum meeting requirement.

SPONSOR TABLE TALK

Table Talks are focused, small-group discussions hosted by participating conference sponsors.

These interactive sessions allow delegates to explore specific investment strategies, market developments, services and industry topics directly with managers and service providers.

Participation is optional, with advance selection available through the conference platform, subject to availability.

NETWORKING OPPORTUNITIES

Meals, breaks and conference receptions provide additional opportunities to reconnect with colleagues and meet investment professionals from across the CAASA community.

Delegates are encouraged to take advantage of both scheduled and informal conversations throughout the conference.

CONFERENCE APP & NETWORKING PLATFORM

The conference platform allows registered delegates to review conference information, communicate with participants, request meetings and select available Table Talks.

Meeting instructions and relevant deadlines will be communicated to registered participants.

CHATHAM HOUSE RULE

Conference discussions are conducted under the Chatham House Rule to encourage open and constructive dialogue.

Participants are free to use information shared during discussions but may not disclose the identity or affiliation of the speaker or any other participant.

CAASA asks all delegates to respect these guidelines and contribute to a professional environment that encourages thoughtful and candid exchanges.



The industry's end-to-end platform for alternative investments.

LEARN MORE

Certain products and services can only be offered by the appropriate entities and only in jurisdictions where they may be lawfully offered. In Europe, certain securities products and services are offered by Institutional CN (Europe), Empresa de Investimento, S.A., registered with CMVM, and iCapital UK Services International, authorized and registered with the FCA, affiliates of iCapital. In Asia, products and services are offered by iCapital SG Pte. Ltd and iCapital Hong Kong Limited, regulated by MAS and SFC respectively.

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EDUCATIONAL PARTNERSHIP

ADVANCING INSTITUTIONAL INVESTMENT EDUCATION

Bodhi Research Group is the founding educational partner of the CAASA Annual Conference, playing a central role in developing and delivering its institutional investment curriculum.

Drawing on its expertise in portfolio construction, manager due diligence, risk management and alternative investments, Bodhi works with CAASA to deliver a program featuring experienced institutional investors and industry experts.

Together, they foster informed dialogue, practical insights and the exchange of perspectives on today's most important investment challenges

EDUCATIONAL INTEGRITY

CAASA does not sell speaking positions within its core educational program. Speakers are selected for their expertise and ability to contribute to substantive industry discussions.

Sponsors participate through opt-in Table Talks, providing focused discussions with interested delegates while preserving the independence of CAASA's educational program.

ADVANTAGE THROUGH INSIGHT



At Bodhi Research Group, we utilize our strong global strategic relationships to research firms on alternative investments.

We complement the internal teams of pensions, endowments, sovereign wealth funds, family offices, and service providers in their work in alternative investments. Add Bodhi to your team!

Bodhi Research Group is an independent, conflict-free firm that is fully focused on research and education in the alternative investments arena.

- Advisory
- Manager Research
- Due Diligence (investment, operational, statistical, structural)
- Evaluate and Implement Managed Account Platform Solutions
- ESG Analysis
- Risk Management Analysis
- Portfolio Diagnostics
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- Asset Allocation
- Privates
- Special Projects
- Research Studies
- Education & Training

Dr. Ranjan Bhaduri
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Founder & Chief Executive Officer

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CAASA ANNUAL CONFERENCE 2026
TUESDAY, NOV 3RD 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. All other registered delegates are welcome to the General Reception in the evening.
11:00 AM	**1:1 meetings / tête-à-tête** 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.
11:45 AM	**Lunch Service Begins**
12:20 PM	**Welcome Remarks** Welcome to the Ninth 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, **Ranjan Bhaduri,** Bodhi Research Group, **Lauretta Chame**, IMCO (Master of Ceremonies)
12:30 PM	**Lunch Keynote – Evaluating Total Portfolio Performance: Pitfalls and Solutions** In this keynote address, Professor Betermier presents brand-new research showing that the more a fund departs from its reference portfolio to add value, the less reliably benchmark-relative performance measures skill. Separating skill from luck can require more than 20 years of data, far beyond the usual three- to five-year horizon. The talk proposes ways to interpret that uncertainty, isolate sources of value creation and improve benchmark selection. **Sebastien Betermier,** McGill University

CAASA ANNUAL CONFERENCE 2026
TUESDAY, NOV 3RD AGENDA

1:15 PM	**Table Talk Session 1**
2:00 PM	**Break**
2:15 PM	**Top of the House: Asset Allocation: Integrating Asset Allocation, Portfolio Construction, and Risk Management** Decisions at the top of the house influence every part of the portfolio. As total portfolio approaches gain momentum, this panel examines how institutional investors are integrating asset allocation, portfolio construction and risk management, and what is proving effective in practice. **Han Yik,** New York State Teachers' Retirement System (NYSTRS), **Monica Firminger,** Mastercard Foundation Asset Management, **Bill Bobey,** CPP Investments
3:00 PM	**Table Talk Session 2**
3:45 PM	**Break**
4:00 PM	**Investment Opportunities across the Canadian Agricultural Ecosystem** This presentation will explore the private-market investment opportunity across Canada's agriculture sector, with a focus on farmland and agtech. It will highlight key themes shaping investment across the agricultural ecosystem and provide an overview of FCC and FCC Capital's role in supporting innovation, growth and investment in the sector. **Gabrielle Fangor,** Farm Credit Canada

CAASA ANNUAL CONFERENCE
SPONSOR TABLE TALKS 1

1:15 PM - 2:00 PM

1. Asset Management One

Asset Management One
Unlocking Systematic Diversification



Mark Tower
Head of Business Development & Investor Relations



Jiro Fujisawa
Co-Head of Portfolio Management

Join an interactive table discussion on how systematic, rules-based strategies may enhance portfolio diversification. We'll explore how disciplined, multi-asset approaches seek more consistent returns, reduce reliance on single betas, and complement traditional discretionary allocations for those looking to allocate to quantitative strategies.

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2. 3iQ

3iQ
Innovative Approaches to Capital Allocation: What Does a New Frontier Institutional Allocation Look Like in Practice



Jonathan Mirarchi
DeFi Manager

The barriers that kept institutional capital out of digital assets have shifted materially. As traditional alternatives fall short amid volatility, geopolitical friction and diminishing returns, this private session examines new ways to look at exploiting the alpha opportunities in digital asset markets through tried and true hedge fund trading strategies.

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3. BMO Global Asset Management

BMO Global Asset Management
Beyond Bonds: Unlocking Opportunities in Structured Credit



Hanna Lechem
Director, Specialized Solutions

Traditional fixed income is no longer the only source of income and diversification. Join us as we examine the growing role of structured credit in institutional portfolios, discussing how these sectors can provide enhanced yield potential, strong credit fundamentals, and valuable diversification benefits in today's dynamic market environment.

---

4. iCapital

iCapital Network
Facilitating Access to Leading Managers for Private Wealth Investors



Tony Mallozzi
SVP, Intl Client Solutions - Americas

Accessing leading alternative asset managers to incorporate into private client portfolios was previously challenging with many of these vehicles having high investment minimums and/or being offshore with manual processes and tax nuances. iCapital's solution has already launched 60 funds locally in market (structured as domestic vehicles and all on Fundserv at very compelling near institutional pricing) and opens up a broader tool kit for wealth managers to enhance diversification, increase alpha and income and downside protection in their client portfolio.

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5. Letko Brosseau Global Investment Management

LetkoBrosseau
LetkoBrosseau Emerging Markets – An absolute return strategy without private market liquidity concerns



Rohit Khuller
Vice President - Investment Management

A public market strategy producing mid teen returns since 2011 by focusing primarily on infrastructure, limiting downside to one small annual loss over that period. Absolute returns without the need for leverage or hedging. Hosted by Rohit Khuller. Rohit is originally from New Delhi, India, with the firm since 1998.

CAASA ANNUAL CONFERENCE
SPONSOR TABLE TALKS 2

3:00 PM - 3:45 PM

1. **Wilshire**

Wilshire
Alpha, Efficiently Delivered: The Role of Hedge Funds for Institutional Portfolios



Jean-Francois Tormo
Senior Portfolio Manager



Vianney Gouny
Client Solutions

This roundtable will provide an update on the hedge fund landscape, covering industry flows, performance and SMA trends, followed by a discussion of how investors use and implement hedge funds within their portfolios to enhance diversification, resilience and capital efficiency.

2. AGAWA FUND MANAGEMENT INC

AGAWA Fund Managements
Beyond Equities and Nominal Bonds: Thoughts on a Framework for Diversifying Equity-Centric Portfolios



James Donegan
President & Managing Partner

How inflation-linked bonds; currencies; gold and commodities; and active strategies can increasingly improve diversification and help manage the risks of equity-centric portfolios when nominal bonds can no longer be relied upon as durable diversifiers.

3. CFM INSIGHT.DATA.CLARITY.

Capital Fund Management (CFM)
Quant Macro Edge: Systematic Hedge Funds in Uncertain Times



Peter Vaiciunas
Quantitative Portfolio Specialist



Steve Shepherd
Head of Canada

Uncertainty is the new normal, and investors are appreciating the role of uncorrelated investments in their portfolios. This roundtable explores the advantages of systematic hedge funds, including diversification, speed, scalability, and data in navigating volatile macro conditions. CFM will share perspectives on how quant macro strategies can complement traditional portfolio allocations, and what allocators should consider when evaluating return drivers in today's environment.

4. nymbus.

Nymbus
Systematic Capital Efficiency: The Case for Return Stacking Using Overlays



Gabriel Cefaloni
Chief Investment Officer

One pool of capital. Multiple return sources. A defined risk budget. Join Nymbus to explore how listed derivatives combine distinct strategies and protection overlays. Discuss capital efficiency, portfolio construction and the limits of diversification, including how exposures are sized and what can happen when markets fall and strategy correlations rise.

5. WHITEBARK INVESTORS

Whitebark Investors
Being Contrarian: Investing in Software in 2026



Tom McConnon
CIO

Since the Q1 "SaaSpocalypse", the equity market has irrationally punished all software and consumer internet. There will be winners and losers in these sectors, but they are not yet properly differentiated. The current dislocation creates opportunity to invest in high-quality companies that will eventually emerge as winners at discounted prices.

3iQ

Forging New Paths in Alternative Investing

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Single & Multi-Asset Exposure

Gain secure, regulated access to leading digital assets through our innovative ETFs.

Active Management

Leverage expert managers and multi-strategy approaches to capture growth, manage risk, and provide portfolio diversification in the evolving digital asset market.

Yield Solutions

Optimize returns through actively managed digital asset strategies and innovative yield solutions with a focus on minimizing risk and safeguarding investor capital.

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join our table talk

Systematic Capital Efficiency: The Case for Return Stacking Using Ov

Hosted by Gabriel Cefaloni, Chief Investment Officer

nymbus.ca

info@nymbus.ca
Montréal, Québec

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CAASA ANNUAL CONFERENCE 2026
TUESDAY, NOV 3RD AGENDA

4:30 PM	**All in the Family: Alpha Generation across Generations** Family offices invest with a perspective that often spans generations. This panel explores emerging trends across markets, managers and family priorities, and where family offices see opportunities for alpha today. **Louis-Philippe Roy,** Joddes**, Dennis Bobyk,** Sagard Wealth, **Loïc Julé,** Richter, **Anthony Berg,** Forthlane Partners
5:00 PM	**Registration Opens for All Delegates**
5:00 PM	**Welcome Reception and Networking – All Delegates** All registered delegates are invited to this opportunity to meet and perhaps begin a more fulsome evening.
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.

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Seeking Better Portfolio Resiliency and Outcomes.

Our core strategy allocates risk, not capital, seeking to balance the portfolio across the economic factors, growth and inflation, that drive asset class returns.

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Falling Growth Bonds, ILBs, Gold	**Falling Inflation** Bonds, Equities

+ COMPLEMENTARY ALPHA

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*As of September 30, 2026

CAASA ANNUAL CONFERENCE 2026
WEDNESDAY, NOV 4TH AGENDA

8:00 AM	**Registration & Breakfast** Please arrive during this 30 minutes so we can start on time and keep to our busy schedule.
8:30 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. 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, **Lauretta Chame,** IMCO (Master of Ceremonies)
8:45 AM	**Keynote - Rates, Tariffs, Markets and Midterms: The Economic Landscape** Held the morning after the U.S. midterm elections, this session examines the forces shaping the economic outlook: interest rates, tariffs and trade policy, and market conditions. Two economists offer their perspectives on what lies ahead and the implications for investors. **Mark Shore,** CME Group, **Jean David Tremblay-Frenette,** AIMCo
9:20 AM	**The Alpha Hunters: Best Ideas for 2027** The search for alpha never stops. Institutional investors share their highest-conviction investment ideas for 2027, from overlooked opportunities to emerging themes, and reveal where they see the most compelling prospects for generating returns in the year ahead. **Gerald Alain P Chen-Young,** NPPFA – National Public Pension Fund Association, **Adam Solan,** Institute of Advanced Study, **David Dong,** University Pension Plan (UPP)



BAYVIEW®

ASSET MANAGEMENT

CAASA ANNUAL CONFERENCE 2026
WEDNESDAY, NOV 4TH AGENDA

9:50 AM	**NowTalk: Climate Risk and Scenario Analysis** Climate risk is now a financial risk that allocators can model and manage. This session explains how scenario analysis helps investors translate climate uncertainty into measurable portfolio impacts, and what that means for risk management and decision-making. **Niall Whelan,** Bodhi Research Group
10:15 AM	**1:1 meetings / tête-à-tête**
11:15 AM	**Credit Where Credit Is Due: Risk, Return and the Future of Private Credit** Private credit has become a core allocation in institutional portfolios. This panel of talented investment professionals examines the critical questions of risk, valuations, liquidity and returns, and how allocators are positioning their portfolios for what lies ahead. **Pierre-Philippe Ste-Marie,** Bodhi Research Group, **Aiman El-Nahas,** University Pension Plan (UPP), **Matt Smagacz,** Kansas State University Foundation
11:45 AM	**Investment Operations as a Strategic Function** Strong investment operations are a source of competitive advantage. This panel examines how operating model transformation, modernized trading and investment operations, and integrated risk and compliance enable investment teams to turn strategy into execution. **James Burron,** CAASA, **Bandhna Mamak,** BCI, **Cordell W. Thomas II,** New York State Nurses Association Pension Plan and Benefits Fund (NYSNA)

CAASA ANNUAL CONFERENCE 2026
WEDNESDAY, NOV 4TH AGENDA

12:15 PM	**Lunch Service Begins**
12:45 PM	**Lunch Keynote: Inside the Mind of a CIO: Navigating a New Investment Regime** In this keynote fireside chat, Dr. Ranjan Bhaduri speaks with Anne-Marie Fink about how she assesses a rapidly changing investment landscape. The discussion examines a macroeconomic and geopolitical environment unlike that of the past 15 years, the rise of the Total Portfolio Approach, concentration across public and private markets and in the drivers of the economy, the growing participation of individuals in private markets, the resurgence of hedge funds and portable alpha, and AI as both an investment opportunity and a tool. **Anne-Marie Fink,** AIMA, **Ranjan Bhaduri,** Bodhi Research Group
1:30 PM	**Behind the Alpha: Hedge Funds in Depth, an Allocator's Perspective** In this fireside chat, Hazlitt Gill goes behind the alpha with Yves Caron to explore how a major allocator selects managers, builds its hedge fund portfolio, and views the role of hedge funds in today's markets. **Hazlitt Gill,** BCI, **Yves Caron,** La Caisse, **Mohamed Farid,** *formerly* World Bank Pension Fund
2:00 PM	**1:1 meetings / tête-à-tête**

CAASA ANNUAL CONFERENCE 2026
WEDNESDAY, NOV 4TH AGENDA

3:00 PM	**A MAP to Alpha: Managed Accounts as Allocator Best Practice** Managed account platforms offer institutional allocators enhanced transparency, control and governance. This panel explores how investors use managed accounts to strengthen risk oversight, customize mandates and access alpha more efficiently, and why the approach is increasingly regarded as best practice. **Caroline Bergeron,** Innocap, **Nicolas Lefevre-Laumonier,** La Caisse, **Christoph Dietrich,** iA Financial Group (Industrial Alliance)
3:35 PM	**An Analysis of Asset Returns Smoothing on Portfolio Performance and Volatilty Profile** An analysis of the potential impact of asset returns smoothing on portfolio performance and volatility profile in up and down markets. **Jan Ericsson,** McGill University, **Pierre-Philippe Ste-Marie,** Bodhi Research Group
4:05 PM	**Protecting your Tail from Correlation Risk** Do hedge funds really diversify? Drawing on 26 years of monthly index data, this research shows that hedge fund strategies vary widely in the benefits they offer. It proposes a framework for allocating to them according to a portfolio's mandate and its exposure to correlation risk. **Mark Shore,** CME Group
4:30 PM	**Reception**
6:00 PM	**End of Conference** Until next year!



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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!

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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.



Anne-Marie Fink
Co-Chair, Global Investor Board
Alternative Investment Management Association (AIMA)

Anne-Marie Fink currently serves as Co-Chair of AIMA's Global Investor Board, a group of two dozen asset owners from around the world and different investor types. Most recently, she was the Chief Investment Officer for Private Markets and Funds Alpha at the State of Wisconsin Investment Board (SWIB) for 6+ years. At SWIB she managed a team of 40 professionals and more than $75 billion across private equity, real estate, hedge funds, equities, fixed income, private debt, and venture capital portfolios.

Previously she served as the chief investment officer for the Employees' Retirement System of Rhode Island and for a large family office. She also worked at State Street Global Advisors as portfolio strategist for alternative investments. Her investment career started at JP Morgan, where she spent more than 16 years in equity and hedge fund research.
Anne-Marie earned a Bachelor of Arts degree from Yale University and an MBA from Columbia Business School. She is also the author of The Money Makers: How Extraordinary Managers Win in a World Turned Upside Down, which draws on investors' insights into best practices in managing companies.

KEYNOTE SPEAKER BIOGRAPHIES



Jean David Tremblay-Frenette
Chief Economist and Head of Economics & Investment Research
Alberta Investment Management Corporation (AIMCo)

Jean David joined AIMCo (Alberta Investment Management Corporation) in December 2010 to lead the Global Tactical Asset Allocation investment activity. He has since then transitioned internally to a senior role, working on investment strategy research, asset allocation, quantitative research, and macroeconomic analysis. He is currently Chief Economist and Head of Economics & Investment Research. In addition, he represents AIMCo as a speaker at external events, conferences, and in the media, and as a member of the Bank of Canada's Market Participant Survey.

Prior experience includes macroeconomic analysis, tactical asset allocation, and systematic global macro portfolio management at Caisse dépôt et placement du Québec (La Caisse). He also worked in strategic investments for the National Bank of Canada. Jean David began his career working in mergers and acquisitions at Credit Suisse in Toronto.

He is a board member of the AIMCo Foundation for Financial Education, L'Observatoire des erreurs (a Montreal-based think tank known as the "Library of Mistakes"), the Afrodescendant Leadership Alliance's Black Wealth Club, and L'Hybride, a non-profit organization dedicated to supporting internationally-adopted adults.

He holds an M.Sc. degree in finance from the Henley Business School – ICMA Centre at the University of Reading, United Kingdom and a BCom. – finance major, Université du Québec à Montréal, Montréal, Canada.

Jean David a joint AIMCo en décembre 2010 afin de créer le portefeuille de répartition tactique globale de l'actif. Depuis, il a évolué vers un rôle de membre principal de l'équipe responsable de la répartition stratégique de l'actif et des stratégies d'investissement, et agit présentement à titre d'économiste en chef et leader du groupe Économie et recherche en investissement.

Auparavant, il cumulait une expérience en analyse macroéconomique, en gestion tactique de l'actif et en gestion de portefeuilles de type « global macro » systématique au sein de la Caisse de dépôt et placement du Québec. Il a aussi travaillé au sein de l'équipe des investissements stratégiques à la Banque Nationale du Canada. Jean David a débuté sa carrière à Toronto, à la banque d'investissement Credit Suisse, au sein de l'équipe de fusions et acquisitions.

Il siège aux conseils d'administration de la AIMCo Foundation for Financial Education, de l'Observatoire des erreurs (l'équivalent montréalais de la « Library of Mistakes »), le Black Wealth Club de l'Afrodescendant Leadership Alliance ainsi que de L'Hybride (un OBNL pour les adultes adoptés à l'international).

Il détient une maîtrise ès sciences (M. Sc.) en finance de la Henley Business School – ICMA Centre de l'Université de Reading, au Royaume-Uni, ainsi qu'un baccalauréat en administration, option finance, de l'Université du Québec à Montréal (Canada).

SPEAKER BIOGRAPHIES



Anthony Berg
Senior Investment Analyst
Forthlane Partners

Anthony plays a pivotal role in the investment process at Forthlane, spending his time on market analysis, strategic and tactical asset allocation, portfolio construction, manager selection, and other duties. Prior to joining Forthlane, Anthony completed his HBA at the Ivey Business School, where he also completed the Ivey Sustainability Certificate. Anthony is a CFA Charterholder.



Caroline Bergeron
Head of Business Development, Canada and Global Head, Sustainability and Impact Solutions
Innocap

As Head of Business Development, Canada and Global Head of Sustainability & Impact Solutions, Caroline is responsible for Innocap's business development activities in Canada as well as its ESG and impact business offering. She leads and develops strategic initiatives targeted to assist Innocap's clients to invest constructive capital in order to generate growth while contributing to a more sustainable world. Caroline strives to have a meaningful impact on asset owners and asset managers as well as on all stakeholders of the ecosystem.

Caroline was previously Managing Director, Investor Relations and Business Development at Innocap. In that role, she developed powerful partnerships with Innocap's institutional clients, lead for two years Innocap's business development efforts in Europe and in the US and was the instigator for our ESG and Impact Solutions product offering. Caroline has over 13 years of experience working in the finance industry. Caroline began her career at Innocap as legal counsel where she helped design and build Dedicated Managed Account Platforms for sophisticated investors around the world. She received her
Bachelor of Laws from the Sherbrooke University, she holds a Master's degree in International Trade Law (LL.M.) from Cape Town University (South Africa) as well as the Chartered Alternative Investment Analyst (CAIA) and Sustainable Investment Professional Certification from Concordia University.

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.



Bill Bobey
Managing Director, Head of Total Portfolio Risk and Analytics, Risk
CPP Investments

Bill oversees Total Portfolio Risk and Analytics for CPP Investments, with oversight spanning strategic portfolio design through total portfolio implementation. Prior to his current role, he held senior roles at CPP Investments in portfolio construction, quantitative investing, and external fund management. Before joining CPP Investments in 2011, he was an Assistant Professor of Finance at the Sobey School of Business and a Senior Quantitative Analyst at Capula Investment Management. He holds a PhD in Finance from the University of Toronto, an MSc in Financial Mathematics from the University of Warwick, an MSc in Structural Engineering from the University of Manchester (UMIST), and a BSc in Civil Engineering from the University of Calgary.

SPEAKER BIOGRAPHIES



Dennis Bobyk
Senior Director, Investments
Sagard Wealth

Dennis is a Senior Director, Investments at Sagard Wealth and a member of the firm's Investment Committee. He has over 15 years of experience across various roles in investments and capital markets. In his current role, he leads manager selection, portfolio construction, and builds multi-asset class investment strategies for ultra-high-net-worth, family office and institutional clients.

Prior to Sagard, Dennis led the public markets investment strategy at BRK Capital, a Montreal-based family office, where he sourced and executed investments across global equities, fixed income, hedge funds, and alternative investments. Dennis previously worked as an equity research analyst at Claret Asset Management and began his career at RBC Phillips, Hager & North.

Dennis holds the Chartered Financial Analyst (CFA) designation and an MBA from Concordia University.



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).

SPEAKER BIOGRAPHIES



Yves Caron
Senior Director, Liquid Alternative Investments
La Caisse

Yves Caron is Senior Director, Liquid Alternative Investments, at CDPQ Funds Management, where he focuses on global macro and emerging markets debt. His investment experience spans liquid and private markets, emerging managers, and GP stakes. Prior to joining La Caisse, he was a portfolio manager at a multi-family office and a fund of hedge funds (FoHF).

He holds an MBA from HEC Montréal and a BSc (Honours) in Biochemistry from McGill University.

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Yves Caron est directeur principal, Stratégies alternatives, chez CDPQ Gestion de fonds, où il se concentre sur les stratégies global macro et la dette des marchés émergents. Son expérience en investissement couvre les marchés liquides et privés, les gestionnaires émergents et les participations dans des sociétés de gestion. Avant de se joindre à La Caisse, il a été gestionnaire de portefeuille au sein d'un bureau multifamilial et d'un fonds de fonds de couverture.

Il est titulaire d'un MBA de HEC Montréal et d'un baccalauréat en sciences, avec distinction en biochimie, de l'Université McGill.



Lauretta Chame
Senior Associate
IMCO

Lauretta is a Francophone financial professional who began her career in Paris at BNP Paribas, where she held various roles across public and private markets. She is currently a Senior Associate at IMCO in Toronto, supporting the infrastructure investment team. She holds a Master's degree in Finance from Leonard de Vinci, a French management school, and is a CFA charterholder.

As an impact-driven professional, she is a member of CFA Society Toronto's Asset Management Committee, which organizes high-profile industry events. She is also a writer and interviewer for the Analyst, CFA Society Toronto's Journal, where she explores current and emerging topics in the investment industry and creates space for thoughtful conversations with local and global leaders.

Having lived across three continents from childhood through adulthood, Lauretta is passionate about global and intercultural connections, languages, and philosophy. Known for her quiet influence, she naturally bridges languages, cultures, countries, and organizations.

SPEAKER BIOGRAPHIES



Gerald Alain P Chen-Young
Chief Investment Officer
National Public Pension Fund Association (NPPFA)

Since 2016, Gerald has served as principal of GCY Associates LLC. GCY Associates LLC is a small, independent, global institutional advisory and consulting firm with clients that have ranged from an Ivy League university, to a small private HBCU, to a multi-billion euro multilateral, Geneva, Switzerland-based scientific research organisation, to multiple international periodicals. He also serves on various boards, including working as an independent director to an integrated, global insurance fund and as an advisory board member to a related insurance group, including serving as the group's Chair, Investment Committee. Most recently (2024), he was named Chief Investment Officer of the National Public Pension Funds Association (NPPFA). He has also served as an advisor/consultant to a global securities law firm and to a former Ambassador.

From 2002 – 2016, Gerald served as VP & Chief Investment Officer for the UNCF. where he actively managed three (3) portfolios through a myriad of outside consultants, managers, custodians, etc. At their peak, those 3 portfolios totalled approximately $1 billion. One was a dedicated, fixed-income portfolio for a special scholarship programme created in conjunction with the Bill & Melinda Gates Foundation that was designed to use a dedicated defeasance strategy to immunise programme liabilities via matching cash flows and durations, akin to pension plans; the second was a traditional, fully-diversified, long-term, endowment portfolio; and the third was a short-term portfolio that staggered maturities across various short-term instruments. Prior to UNCF, he worked with UBS as a retail broker and with PaineWebber (1995) as part of a team for institutional fixed income sales covering government issues, corporates, Eurobonds, etc. Lastly, he worked in both the retail and commercial banking divisions of Riggs National Bank of Washington (1990) in multiple capacities.

Gerald holds postgraduate degrees in Economics from the London School of Economics & Political Science and York University and in Law from the University of Miami and the Washington College of Law. His undergraduate degree is in Economics from the American University with honours. Gerald has served on multiple advisory boards1, committees, etc. He was nominated for multiple industry awards and, most recently, won the award from Institutional Investor "Investor Intelligence Awards, Endowments & Foundations, Thought Leadership" (2016) in the endowment and foundation space. He was nominated twice on the "ai-CIO, Power 100 CIOs" (2012 & 2013) global list of chief investment officers and has spoken on many global institutional investor panels all over the world.2 Most recently, Gerald agreed to serve as an Adjunct Professor to teach a class on "Asset Management" at Georgetown University in Washington, DC.

Gerald is a dual Jamaican-American citizen, married, and currently lives in Washington, DC. He is partly bilingual (English & French) and is also an avid, recreational chef de cuisine, sportsman, voracious reader and global traveller. Lastly, his favourite saying & life's aspiration and motto is: "Stay centred in the Tao and the world comes to you. Comes, and isn't harmed. Comes, and finds contentment." – by Lao Tzu (ca. 5th c. BC.)

SPEAKER BIOGRAPHIES



Christoph Dietrich
Vice President, Head of External Market Neutral Strategies
iA Financial Group (Industrial Alliance)

Christoph Dietrich leads iAGAM's External Market Neutral Strategies program where he is responsible for the selection and oversight of third-party strategies that are uncorrelated to broad market movements. He has more than 15 years of experience in the finance industry, combining capital markets expertise and institutional investment management. Prior to joining iA in 2026, Christoph worked at BofA Merrill Lynch and at Ontario Teachers' Pension Plan. He holds a master's degree in Finance from Sciences Po Paris.



David Dong
Senior Analyst, Active Public Markets
University Pension Plan (UPP)

David Dong is a Senior Analyst in the Active Public Markets team at University Pension Plan (UPP), where he focuses on external manager allocation for credit and multi-asset strategies. His responsibilities include investment due diligence, portfolio construction, and portfolio management across a range of hedge fund strategies, including managed futures, systematic macro, quantitative and discretionary multi-strategy, and long-biased credit.

Before his current position, David held several roles at UPP, starting as an intern in Active Public Markets and advancing through various positions focused on both hedge fund and long-biased equity investing. Prior to joining UPP, he completed internships with Ontario Teachers' Pension Plan (OTPP), OMERS, and BMO Capital Markets, where he developed experience in research, trading, and analytics.
David holds a Master of Financial Economics (MFE) from the University of Toronto's Rotman School of Management and a Bachelor of Mathematics from the University of Waterloo, with a double major in Actuarial Science and Statistics. He is a CAIA Charterholder and an FRM Certified Professional.

SPEAKER BIOGRAPHIES



Aiman El-Nahas
Director, Private Debt Lead
University Pension Plan (UPP)

Aiman El-Nahas currently serves as Director, Private Debt at University Pension Plan Ontario (UPP) where he leads all aspects of investment strategy development, new investment execution, and management of portfolio investments. Prior to UPP, Aiman was a senior investment team member within Ontario Power Generation's Fund Management Group. Aiman directly supported the build out of OPG's multi-billion credit portfolio, focused predominantly on asset-based and infrastructure fund partnerships, platform investments, co-investments, and direct investments. Before his tenure at Ontario Power Generation, Aiman held various roles at CST Savings Inc. and BNY Wealth, focused on fixed income and multi-asset investments. Aiman holds an MBA from the Schulich School of Business at York University.



Jan Ericsson
Associate Professor of Finance, Academic Director
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.



Gabrielle Fangor
Director, Portfolio Management, FCC Capital
Farm Credit Canada

Gabrielle joined Farm Credit Canada in 2024 as a founding member of the team and helped build the FCC Capital division. As the Director of Portfolio Management for FCC Capital, she leads the development of portfolio construction, strategy, reporting and policy within FCC Capital. Prior to joining FCC, she worked at PSP Investment within their Natural Resources team, where she spent nearly 10 years building and supporting a portfolio of farmland, timberland and critical mineral assets worth over $20B.

SPEAKER BIOGRAPHIES



Mohamed Farid
Absolute Return Strategies Investment Consultant

Mohamed Farid is an investment professional bring over 25 years of experience investing directly in hedge funds. His last role was the Head of Absolute Return Strategies at the World Bank Pension Fund, managing over $4 billion of Absolute Return Strategies portfolio. He played an instrumental role at the Investment Committee at the Pension Plan portfolio of the World Bank. Mohamed opportunistically co-invested with some hedge fund managers and implemented internal hedging strategies.

Prior to joining the World Bank Pension Plan, Mohamed worked for Deloitte & Touche and KPMG financial consulting groups in Toronto, Canada, Washington D.C, Egypt and Thailand where he led acquisitions and bankruptcy engagements for leading clients in North America and Asia. Mohamed started his career in commercial banking. He holds a master's degree from the Johns Hopkins University in International Economics and Political Science as well as a Master's degree in Banking and Finance from Finafrica Foundation in Milan, Italy.



Monica Firminger
Senior Portfolio Manager
Mastercard Foundation Asset Management

Monica is responsible for the research and development of MFAM's long-term asset mix, risk budgeting, and capital planning. She works closely with the investment team to evaluate opportunities within a total portfolio framework.

Monica has over a decade of experience in quantitative investing and portfolio design. Before joining MFAM, she worked at OPSEU Pension Plan Trust (OPTrust), where she researched and implemented quantitative strategies with a total-fund focus. Monica began her career on the liquid alternatives team at Northwater Capital Management Inc.

Monica earned a Bachelor of Science in Physics from Mount Allison University and a Master of Mathematical Finance from the University of Toronto.



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.

SPEAKER BIOGRAPHIES



Loïc Jule
Executive Vice President – Head of Public Markets, Hedge Funds and Direct Investments Transactions
Richter

With over 25 years of experience in financial markets, Loïc is known for his strategic thinking, innovative mindset, and ability to bring clarity to complexity. His approach is grounded in a strong institutional foundation and a commitment to delivering thoughtful, high-quality investment solutions. Across his career, he has earned the trust of partners and peers alike by building long-term relationships and consistently aligning investment decisions with each client's broader vision and values.

At Richter, Loïc oversees public markets, absolute return strategies, and direct investment transactions. Drawing on his extensive institutional background, he takes a comprehensive view of each mandate – working closely with internal teams and business owners to evaluate opportunities, construct portfolios, and deliver meaningful results.

Loïc is valued for his open-mindedness and team-first mindset. He believes the best ideas emerge through collaboration and brings a balanced, people-focused approach to every conversation. Clients and colleagues appreciate his ability to listen deeply, think creatively, and stay focused on what matters most: navigating investments with confidence and clarity.



Nicolas Lefevre-Laumonier
Managing Director, External management – Alternative Investments
La Caisse

Nicolas Lefevre-Laumonier is Managing Director of Liquid Alternative Investments within the External Portfolio Management group at La Caisse, where he oversees a CAD 12.5 billion hedge fund overlay program across all alternative strategies. He has been with La Caisse for almost 15 years, following a career in financial markets in Europe with NYSE Euronext, Société Générale, and AXA Re. Nicolas holds a Bachelor's and Master's degree in Economics and Mathematics from France, as well as a Master of Science in Financial Markets from HEC Montréal, where he has been teaching courses on Finance and Alternative Strategies for the past four years.

SPEAKER BIOGRAPHIES



Bandhna Mamak
Senior Managing Director, Operations, Capital Markets & Credit Investments
BCI

Bandhna Mamak is Senior Managing Director, Operations, Capital Markets & Credit Investments at British Columbia Investment Management Corporation (BCI), where she leads the financial, operational, and business functions of a major institutional investment group. With over two decades in capital markets, she has built a reputation as a transformation leader — driving large-scale operating model changes, modernizing trading and investment operations, and partnering closely with investment teams to translate strategy into execution. Her background spans trading, investment operations, risk, and compliance.

Bandhna holds an MBA in Finance from McGill University and is both a CFA and CAIA Charterholder.



Louis-Philippe Roy
D*irector 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



Mark Shore
Director and Economist
CME Group

Dr. Mark Shore, Director, and Economist at the CME Group. He is responsible for generating economic analysis on global financial markets by identifying emerging trends and evaluating economic factors. He is a well-known alternative investment expert with over 30 years of experience in capital markets. Dr. Shore is also:

• An adjunct professor at DePaul University in Chicago.
• He is a contributing writer for the Commodity Insights Digest (CID) at Bayes Business School—City University of London, UK.
• On the advisory board for the National Public Pension Fund Association (NPPFA)

He is frequently invited to speak at industry and academic conferences. Mark has contributed macroeconomic research to several global organizations.
Mark received his Doctorate from DePaul University with his dissertation on alternative investments. He received his MBA from the University of Chicago.



Matt Smagacz
Senior Director of Investments
Kansas State University Foundation

Matthew Smagacz, CFA, FRM, is Senior Director of Investments for the Kansas State University Foundation, where he helps oversee the $1.4 billion portfolio. With more than 23 years of institutional investment experience, he has led manager research, portfolio construction, asset allocation, risk management, and investment policy development across endowment, foundation, sovereign wealth fund, and family office investment platforms.

Prior to joining the Foundation, Matt served as Senior Investment Officer for the Wyoming State Treasurer's Office, helping oversee the State's now $34 billion sovereign wealth fund.

Matt holds a BSBA in Finance from Washington University in Saint Louis. He is a CFA charterholder and a Financial Risk Manager (FRM).

SPEAKER BIOGRAPHIES



Adam Solan
Investment Director
Institute for Advanced Study

Adam Solan is an Investment Director at the Institute for Advanced Study (IAS), an endowment supporting a community of scholars in Princeton, NJ. Before joining IAS, Adam held roles at State Street Global Advisors and Ocean Road Advisors. He started his investment career at Tulane University's investment office. Adam has a BSM in Finance and Economics from Tulane University. He also holds the Chartered Financial Analyst designation.



Pierre-Philippe Ste-Marie
Managing Director Investment Research
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.



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 investment 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 Group, Mercer Investments LLC's operational due diligence consulting group. While at Mercer Sentinel Group, 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, South America, Europe, and Asia.

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.



Han Yik
Senior Advisor to the ED/CIO
New York State Teachers' Retirement System (NYSTRS)

Han Yik is Senior Advisor to the Executive Director and Chief Investment Officer of the New York State Teachers' Retirement System (NYSTRS), one of the largest public pension funds in the United States with approximately $160 billion in assets. A member of NYSTRS' Executive Leadership Team, he oversees strategic asset allocation, investment governance and the integration of responsible investment across the portfolio.

Previously, Han served as Head of Institutional Investors at the World Economic Forum, where he engaged the leadership of the world's largest sovereign wealth funds, pension funds, and endowments and led the WEF's Retirement Investment Systems Reform initiative, whose recommendations influenced public pension legislation globally.

Earlier in his career, Han managed outsourced-CIO mandates at Bank of America with full investment discretion for foundations, endowments, and pension funds, growing discretionary AUM from $1.5 billion to $2.5 billion. He began his career as an actuarial consultant at Towers Perrin and Mercer.
Han holds a B.S. in Applied Mathematics from Yale University, where he won the Benjamin F. Barge Prize for Excellence in Mathematics. He is a member of the Milken Institute Global Capital Markets Advisory Council, and is an active participant in the PPI, ICPM and AAAIM communities.



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P/E INVESTMENTS



FIAM

A 13-YEAR JOURNEY

JAMES LIT THE SPARK

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1 THE BEGINNING

The Spark
James Burron & AIMA Canada

In 2009, James Burron, then head of AIMA Canada, launched the Summer Social across Canada. Claude Perron became his Montreal collaborator, helping establish the first connections within a growing investment community.



2 THE EARLY YEARS

The Méchoui
Building a Community

What began as a summer gathering gradually became an enduring Montral tradition. James transitioned from AIMA to CAASA, while the collaborative spirit continued with AIMA under Claire Van Wyk-Allan's leadership.



3 2020 - 2021

FIAM Is Born
Resilience Through COVID

FIAM is formally established in January 2020, broadening its mission beyond networking to connect technology, AI, finance and asset management. During the pandemic, webinars sustained engagement and relationships.

4 2022 - 2025

From Events to a Collaborative Platform

In-person gatherings resume. FIAM expands its institutional, academic and industry relationships, launches the McGill-FIAM Asset Management Hackathon and strengthens its collaboration with leading professional associations.



AIMA · CAIA ASSOCIATION · CFA Montréal · Canadian Association of Alternative Strategies & Assets · Emerging Manager Alliance · FIAM

5 2026 - THE STRATEGIC TURNING POINT

From an Event-Centric Organization to an Ecosystem-Building Platform

Inspired by the collaborative spirit of Davos, FIAM embarks on a major strategic transformation: moving beyond organizing events to building a durable platform for institutional leadership, cross-sector collaboration and collective action. The inaugural FIAM Montréal Summit welcomed more than 500 participants from 225 organizations and institutions.



6 THE NEXT CHAPTER

Building Canada's AI-Driven Investment Ecosystem

FIAM is a neutral, independent, nonprofit platform connecting institutional investors, asset managers, academia, technology leaders, professional associations and emerging talent at the intersection of AI, data science, finance and asset management. **By breaking down silos and catalyzing collaboration, FIAM seeks to create opportunities and achieve collective outcomes that no single institution could accomplish alone.**

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