A Celebratory Evening Recognizing the Distinguished 2024 AlphaEdge Winners

Alpha Generation– Private Credit Investing
- Andrea Kenyon, Managing Director, AIMCo

Alpha Generation – Real Assets Investing
- Joe Aguilar, Chief Investment Officer, Illinois State Treasury
- Michael W. Frerichs, Illinois State Treasurer

Alpha Generation – Private Equity Investing
- Ngoc Can, Portfolio Director, Texas Municipal Retirement System

Outstanding LP- GP Partnerships
- ArcLight Partners

Institutional Consultant of the Year
- David Sheng, Managing Director, Aksia

Multi-Asset Investment Approach
- Waymond Harris, Senior Vice President, Treasurer, Blue Cross Blue Shield of Michigan

AlphaEdge Recognition
- Kristin Agatone, Chief Investment Officer, Lehigh University

Next Generation Recognitions
- Ning Wang, Principal Investment Manager, American Chemical Society
- Jarad Vary, Investment Portfolio Manager, Carilion Clinic
- Preet Chawla, Senior Director, Carnegie Corporation of New York
- Erik Ogren, Managing Director of Investments, Carnegie Mellon University
- Bill Li, Director, Senior Investment Officer, Mass PRIM
- Anupam Kathpalia, Associate Director, Memorial Sloan Kettering Cancer Center
- Ben Holthus, Senior Investment Analyst, Montgomery County Employees Retirement Fund

Investment Team of the Year
- New York State Common Retirement Fund

Visionary of the Year
- Cheryl Alston, Executive Director & Chief Investment Office, Dallas Employees' Retirement Fund

Most Influential Women in Investment Management
- May Vang, Vice President of Treasury & Chief Investment Officer, Blue Cross Blue Shield of Minnesota
- Valerie Sill, President & Chief Executive Officer, DuPont
- Cathy Ulozas, Chief Investment Officer, Drexel
- Kavita Nayar, Head of Private Investments, DUMAC, Inc.
- Kate Murtagh, Managing Director of Sustainable Investing and Chief Compliance Officer, Harvard Management Company
- Sarah Samuels, Head of Research, NEPC
- Anastasia Titarchuk, Chief Investment Officer, New York State Common Retirement Fund
- Ghiane Jones, Deputy Chief Investment Officer, Teachers' Retirement System of the State of Illinois
- Ashley Baum, Senior Director, Teachers Retirement System of Texas
- Meredith Jenkins, Chief Investment Officer, Trinity Wall Street
- Harisha Koneru Haigh, Managing Director, Northwestern University
- Nimisha Srivastava, Head of Investments, WTW

INSTITUTIONAL
INVESTOR

II

Institutional Investor Week

June 24–26, 2024
Newport Marriott
Newport, RI

Navigating Challenges and Generating Alpha: 2024 & Beyond

If 2023 was the year the economic cycle took center stage with every predicting soft versus hard landing, then 2024 takes a shift towards global politics and elections, influencing every decision - even those of long-term investors. All eyes will be on DC – whether it will be interest rate decision, and will we see rates trend down as we head towards November, or deciphering political rhetoric on regulations, emerging markets, and three-letter social trends. Against this backdrop, Institutional Investor is proud to return to Newport this summer for our second annual **Institutional Investor Week**, on **June 24 to 26.**

Over two insightful days in Rhode Island, the investment elite will come together and meticulously analyze the evolving investment landscape, exploring optimal strategies to extract alpha and generate value throughout the year and beyond.

This multi-day, multi-track, and multi-platform experience will unite allocators from across the different channels and regions, delving into cutting-edge investment themes. Our focus will span transformative strategies across four key sector themes:

- **Real Assets –** Long-term Low-risk investing in a volatile environment.
- **Multi-Assets –** Diversifying your portfolio with liquid solutions.
- **Private Markets –** Will valuations keep going up?
- **Thematic & Alpha Investing Edge**– Investment, Innovation & Integrity

Be part of II's second annual **Institutional Investor Week** on **June 24-26** at the **Marriott** in **Newport, RI.**

Sponsors

abrdn
Allspring Global Investments
Apollo Global Management
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Manulife Asset Management
Marcus Partners
Metlife Investment Management
Ninety One
PGIM Fixed Income
Sailing Stone Capital Partners
Star Mountain Capital
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2024 Advisory Board

Real Assets

Paul Joss, *Head of Strategic Asset Allocation*, **American Equity Life**
Rajiv Mallick, *Head of Risk Management,* **APG**
Jefferson B. Weston IV, *Portfolio Manager – Real Estate & Real Assets*, **Arizona Public Safety Personnel Retirement System**
Matthew DeAngelo*, Deputy Chief Investment Officer / Risk Manager*, **Drexel University**
Petya Nikolova, *Deputy Chief Investment Officer*, **New York City Retirement Fund**
Jim Bethea, *Chief Investment Officer*, **University of Iowa Center for Advancement**
Kaylon McInelly, *Associate Vice President,* **West Virginia University Foundation**

Multi-Asset

Susan F. Chung, *Senior Vice President and Chief Investment Officer*, **Amica Insurance**
Zach Mees, *Senior Director, Portfolio Management*, **Carnegie Corporation of New York**
Fred B. Greear, *Vice President and Chief Investment Officer*, **Carilion Clinic**
Catherine Ulozas, Chief Investment Officer, **Drexel University**
Bill C. Li, *Director of Portfolio Completion Strategies*, **Massachusetts Pension Reserves Investment Management (Mass PRIM)**
Justin Young, *Director of Investments*, **Multilateral Endowment Management Company (MEMCO)**
Josh Adler, *Senior Manager of Hedge Funds & Portable Alpha*, **Raytheon Technologies**
Ryan Johnston*, Senior Analyst - Funds Alpha Team*, **State of Wisconsin Investment Board**
Jessica Lerman, *Senior Investment Analyst***, Starr Insurance**
Mohamed Farid, *Principal Portfolio Manager*, **World Bank**

Private Markets

Ning Wang, *Principal Investment Manager*, **American Chemical Society**
John Hennig, *VP Alternatives*, **Arch Capital Group**
Erik Ogren, *Managing Director of Investments*, **Carnegie Mellon University**
Brendt Simpson, *Director,* **Colgate University**
Nate Molinari, Vice President, Investments, **Hamilton Insurance Group**
Matt Meads*, Director*, **Hershey Trust Company**
Elizabeth Caldas, *Senior Investment Officer, Credit & Opportunistic*, **New York State Common Retirement Fund**
Geoff Abrahams, *Investment Manager,* **The Harry and Jeanette Weinberg Foundation**
Bevin Brown, *Managing Director*, **Liberty Mutual Investments**

Thematic Investing

Preet Chawla, *Senior Director*, **Carnegie Corporation of New York**
Kyle Stewart, *Investment Director*, **Children's Health System of Texas**
Kate Murtagh, *Managing Director and Chief Compliance Officer*, **Harvard Management Company**
Ajit Singh, *Chief Investment Officer*, **Houston Firefighters' Relief and Retirement Fund**
Kristin Agatone, *Chief Investment Officer***, Lehigh University**
Charles Van Vleet, *Assistant Treasurer and Chief Investment Officer of Pension Investments,* **Textron Inc.**
Zach Smith, *Senior Investment Analyst*, **University of St. Thomas**

Agenda
Monday, June 24, 2024

3:00

Registration & Networking
East Foyer

3:30 – 4:00

Opening Session - 2024 Outlook: The key themes impacting allocators in 2024 *(Allocators only)*
Grand Ballroom, Salon IV

Throughout the past year, II has leveraged numerous events to gather insights from our allocator community. In this exclusive 'closed door' session, we'll unveil the results, covering asset allocation, investment trends, and the key macro environmental factors shaping your decision-making processes.

Presenter: Alejandra Grindal, *Chief Economist*, **Ned Davis Research Group**

4:00 – 4:40

CIO Panel: What's on your mind in 2024/2025? *(Allocators only)*
Grand Ballroom, Salon IV

We are taking the opportunity to assemble four leading investors to discuss what is keeping them up at night – from challenges to opportunities. Participate in this exclusive, off-the-record session to learn from and engage with fellow investors, compare strategies with peers, network, and gain insights into potential shifts in capital allocation trends over the next 12 months.

Moderator:
- Michael Elio, *Partner*, **StepStone Group**

Panelists:
- Kristin Agatone, *Chief Investment Officer*, **Lehigh University**

4:40 – 5:00

Tabletop Discussion *(Allocators only)*
Led by table moderators, and in assigned seating, delegates will share their views on the preceding panels. To what extent do you agree – or disagree – with the views put forward?
Table Hosts:
- Jarad Vary, *Investment Portfolio Manager*, **Carilion Clinic**

5:00 – 6:00

Welcome Reception
Atrium

Please join us as we raise a toast to inaugurate our second year of Institution Investor Week in beautiful Newport. Nestled along the stunning coastline, Newport provides the perfect backdrop for our gathering of investors, industry experts, and thought leaders. Come and connect as we kick off two days dedicated to exploring the latest trends, strategies, and opportunities in institutional investment world. Whether you're a seasoned investor or new to the scene, this event offers an ideal platform to exchange ideas and forge meaningful relationships against the backdrop of Newport's charm and elegance.

Agenda
Tuesday, June 25, 2024

8:15–9:00

Registration and Breakfast
East Foyer

8:30–9:00

Expert Corner Breakfast
Boardroom
Expert: Paul Marcus, *Chief Executive Officer,* **Marcus Partners**

The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.

9:00–9:05

Welcome and Introduction to Day One
Grand Ballroom - Salon I & II

Opening remarks: Katarina Storfer, *Managing Director, Head of North America*, **Institutional Investor**

9:05–9:15

Benchmarking Survey
Grand Ballroom - Salon I & II

Moderator:
To be announced

9:15–9:55

Macro Debate: What Forces Are Shaping the Investment Landscape in 2024 and Beyond?
Grand Ballroom - Salon I & II

The past year presented formidable challenges, marked by the most significant inflationary surge in generation. This prompted central bankers in developed markets to elevate policy rates to levels unseen since the GFC. Complicating matters further, geopolitical tensions and international disintegration loomed large. Yet can we anticipate greater predictability in 2024? In this opening debate, leading macro strategists will analyze the present and forthcoming events shaping the investment landscape for 2024 and beyond.

Speakers: Alejandra Grindal, *Chief Economist*, **Ned Davis Research Group**
Bryant VanCronkhite, Senior Portfolio Manager & Co-Head of the Special Global Equity team**, Allspring Global Investments**
Moderator: To be announced

Concurrent Sessions
All attendees may choose one of two sessions to join.

10:00–10:45

Real Assets Edge:
Salon III

Chairperson: To be announced

Navigating the Real Assets Landscape: Trends, Challenges, and Opportunities
Real Assets is the asset class which gets most hype during an economic slowdown and downturn. Commentators, strategists and managers claim that it is recession proof. However, data is showing otherwise, and institutional investors have reduced their overall real asset allocation, likely due to recent market falls, and perceived risks in certain sectors. During this session, we will ask:

- After a challenging 2023, will 2024 be a year where investors invest with optimism?
- What is the primary reason why investors are allocating to real assets today?
- How have recent market challenges impacted investor allocations across the asset class?
- What returns are investors expecting from their real assets' portfolio?
- North American Investor trends compared to their global counterparts.

Moderator: To be announced

Panelists:
Olivia Wassenaar*, Partner, Head of Sustainability and Infrastructure*, **Apollo**

Multi-Asset Edge:
Salon IV

Chairperson: To be announced

Orchestrating Multi-Asset Success: Building Robust Portfolios through Diversification
As global markets continue to face unprecedented challenges, the need for adaptive multi-asset strategies has never been more critical. Join us for an engaging panel discussion where industry experts will delve into the intricacies of navigating today's complex market dynamics and discuss some key questions:

- What are the benefits of diversification in reducing portfolio volatility and enhancing risk-adjusted returns?
- How can dynamic asset allocation strategies be effectively utilized to adapt to changing market conditions?
- How do you monitor and adjust portfolios to achieve desired outcomes for long-term financial goals?

Moderator: To be announced
Panelists:
Charles Van Vleet, *Assistant Treasurer and Chief Investment Officer of Pension Investments*, **Textron Inc.**
Erika K. Murphy, *Portfolio Manager,* **Fidelity Investments**
Senior Representative, **D.E Shaw**

10:45–11:15

Coffee Break
East Foyer

Expert Corner with Coffee - Building Multi-Asset Portfolios
Board Room
Expert: Erika K. Murphy, *Portfolio Manager,* **Fidelity Investments**
Ian Johnson, *Institutional Portfolio Manager, Global Institutional Solutions*, **Fidelity Investments**

The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.

11:15–12:00

Real Assets Edge
Salon III

The Quandary of Real Estate – Where are the Opportunities in 2024?
Despite the recent challenges facing the post-covid real estate market, real estate remains the

Multi-Asset Edge:
Salon IV

Total Portfolio Construction: Integrating Risk Management and Liquidity Strategies Across Asset Classes
In this dynamic and ever-changing market environment it is crucial to discuss risk management and liquidity

most popular of the real assets group by far. During this session, our panelists will explore:

- ❖ Which RE groups and geographic are most investable and which should be off-limited?
- ❖ What are the current global trends shaping the real estate market in 2024?
- ❖ What regions are considered safe havens for real estate investment amid geopolitical uncertainties?
- ❖ How are demographic changes, shaping real estate investment trends?

Moderator: To be announced

Panelists:
Jefferson B. Weston IV, *Portfolio Manager – Real Estate & Real Assets,* **Arizona Public Safety Personnel Retirement System**
Paul Marcus, *Chief Executive Officer*, **Marcus Partners**

strategies across diverse asset classes within a total portfolio. The speakers will discuss issues such as:

- ❖ What is total portfolio construction, and the role it plays in your overall investment strategy?
- ❖ How to quantify risk at the portfolio level, considering factors such as volatility, correlation, and downside protection?

Moderator: To be announced

Panelists:
Mohamed Farid, *Principal Portfolio Manager, Head-Absolute Return Strategies*, **World Bank**
Fred Greear, *Vice President and Chief Investment Officer,* **Carilion Clinic**

12:00–12:30

Keynote Conversation with Fareed Zakaria
Grand Ballroom - Salon I & II

Delving into the themes of his latest book, "Age of Revolutions," renowned political commentator and bestselling author Fareed Zakaria explores the global surge of populism. By dissecting the amalgamation of populist fervor, ideological divisions, economic upheavals, technological advancements, and international uncertainties, he provides historical insights and practical perspectives on navigating our turbulent world. Don't miss this insightful discussion as Zakaria joins us live from the Aspen Ideas Festival.

Speaker: Fareed Zakaria, Host – GPS, CNN; Columnist, The Washington Post & Bestselling Author, Age of Revolutions
In Conversation with: David Braham, Executive Director - Head of Asset Management Relations, Institutional Investor

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12:30–1:45

Lunch
Atrium

1:45–2:30

Real Assets Edge:
Salon III

Commodities and Energy Investing During a Time of Domestic and International Uncertainty

Commodity and energy investors are used to uncertainty, dealing with market fluctuations every day. But in the post-pandemic era traders have had to face a constantly evolving global trading landscape shaped by energy price market volatility, geopolitical tensions in Russia and the Middle East, rapid technological innovations and pressures of the accelerating green transition. Yet many have succeeded in transforming challenging

Multi-Asset Edge:
Salon IV

Maverick Moves: Charting a Path through Emerging Markets Diversification

- ❖ How can investors navigate the heightened volatility and geopolitical uncertainties in emerging markets?
- ❖ What sectors and industries are expected to drive growth in emerging markets in 2024?
- ❖ How can investors leverage local insights and partnerships to seize emerging market opportunities effectively?

times into profit boosting opportunities. We will hear from leading energy investors about how they are succeeding in this challenging sector.

Moderator:
Catherine Ulozas, *Chief Investment Officer,* **Drexel University**

Panelists:
Senior Representative, **Arclight**
MacKenzie Davis, *Managing Partner,* **SailingStone Capital Partners**
Kaylon McInelly, *Associate Vice President of Investments*, **West Virginia University Foundation**
Erik Moss, *Investment Director,* **YMCA Retirement Fund**

Moderator: To be announced
Panelists:
Todd Howard, *Portfolio Manager,* **MetLife Investment Management**

2:30–3:15

Real Assets Edge:

The Future of Infrastructure Investing
Salon III

A new social, political, and economic reality calls for infrastructure to be reimagined - more digital, more sustainable, and more equitable. From broadband to transport, our panel of experts will be discussing how they are approaching a transformed infrastructure sector:

- ❖ The pandemic shifted demands with more work from home, more broadband, and more transportation options. What avenues are available for investors to leverage advancements in infrastructure?
- ❖ With technology reshaping infrastructure and many expect AI, cloud computing, and cybersecurity to increase this trend, our panel will explore how investors should capitalize on digital technology development?

Moderator: To be announced

Panelists:
Ivan Wong, *Partner, Concession Infrastructure*, **abrdn**
Rajiv Mallick, Head of Risk Management**, APG Asset Management**
Benjamin Holthus, *Senior Investment Analyst*, **Montgomery County Employee Retirement Plans**

Multi-Asset Edge:

Quantitative Insights: Unlocking Opportunities in Systematic Investment
Salon IV

- ❖ How are quantitative models evolving to unlock opportunities in systematic strategies?
- ❖ How do systematic investors select and combine factors to optimize portfolio returns and manage risk?
- ❖ How is technology such as AI and machine learning reshaping systematic investments?

Moderator: To be announced
Panelists: To be announced

3:15–3:45

Coffee Break
East Foyer

Expert Corner with Coffee
Boardroom

Expert: To be announced

The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.

3:45–4:30

Allocators' Panel: *Tame the Untamed?*
Navigating Diversification and Alpha-Hunting for Success in 2024 and Beyond
Grand Ballroom - Salon I & II

In a world marked by market volatility, shifting interest rates, election anxieties, geopolitical uncertainties, and a myriad of global challenges, investors face a challenging landscape. Yet, within every crisis lies potential opportunities, and the market is ripe with investment opportunities. This session brings together top allocators from the industry to shed light on emerging trends and equip participants with the insights needed to navigate the evolving investment terrain effectively.

Moderator: To be announced
Panelists:
Bill C. Li, *Director of Portfolio Completion Strategies*, **Massachusetts Pension Reserves Investment Management (Mass PRIM)**
Bevin Brown, *Managing Director*, **Liberty Mutual Investments**

4:30–5:15

Candid Conversation: The Goal of Private Markets
Grand Ballroom - Salon I & II

After 15 years of record growth followed by a subdued 2023, the investment sector is finally asking questions about what the aims, objectives, and future of private markets investing should be. Is diversification the goal or the result? How is private markets investing different from the rest of the portfolio, and what is the upside? During this candid conversation, we will hear from two leading allocators on how they are utilizing private markets to enhance their portfolios. Join us as we delve into the nuances and strategies that drive success in this dynamic sector.

Speakers: Jim Bethea, *Chief Investment Officer*, **University of Iowa Center for Advancement**
Moderator: To be announced

5:30–7:00

Connect & Collaborate on Newport Harbor Boat Cruise
Bowen's Wharf, Newport, RI

Join your peers for an exciting opportunity for professionals from investment industries to come together and engage in a dynamic and collaborative environment to share ideas, exchange valuable insights, and foster meaningful connections. And continue a festive evening of cocktails and canapes aboard the Coastal Queen as we explore the spectacular views of the lighthouses and historic sights surrounding magnificent Newport Harbor and lower Narragansett Bay.

Agenda

Wednesday, June 26, 2024

8:00–8:50

Registration and Breakfast
East Foyer

8:15–8:45

Expert Corner Breakfast
Boardroom
Expert: *Senior Representative,* **Arclight (proposed)**

The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.

8:45–9:00

Welcome and Introduction to Day Two
Grand Ballroom - Salon I & II

Opening remarks:
To be announced

9:00–9:40

Opening Conversation - The Countdown to November
Grand Ballroom - Salon I & II

During this opening conversation, former White House Press Secretary, Ari Fleischer will be providing attendees with a “behind the scenes” look at what to expect between now and November 5th. Ari will be sharing White House anecdotes, crisis communication tips, and analysis on all the 2024 races – from Congress and Senate to the race for 1600 Pennsylvania Avenue.

Participant: Ari Fleischer, *Former White House Press Secretary*

Concurrent Sessions
All attendees may choose one of two sessions to join.

9:45–10:20

Private Markets Edge
Salon III

Chairperson:
To be announced

The Renewed Value Proposition for Private Markets
The private market boom that followed the 2008 global financial crisis was an era of unprecedented AUM growth, abundant M&A deal and leveraged buyouts, and robust investor returns. Concurrently, private credit and real assets experienced remarkable expansions. However, the market's momentum ground to a halt in the second half of 2022, attributed largely to interest rate hikes, global conflict, and inflationary pressures. Despite prevailing uncertainties, how can private markets leverage

Thematic & Alpha Investing Edge
Salon IV

Chairperson:
To be announced

Beyond Borders: Exploring Global Megatrends for Thematic Investment Allocation

- ❖ How to allocate capital to thematic strategies based on global megatrends?
- ❖ What role does disruptive technology play in shaping opportunities across borders?
- ❖ What sectors and themes are emerging as key drivers of global megatrends, and how to tap them?

the current landscape to their advantage and deliver enhanced returns for investors and stakeholders? In the midst of such market volatility, which sectors, regions, and asset classes within private markets hold tangible opportunities for growth?

Moderator:
To be announced

Panelists:
Erik Ogren, *Managing Director of Investments*, **Carnegie Mellon University**

Moderator:
Nedelina (Nina) Petkova, *Senior Investment Director,* **NEPC, LLC**

Panelists:
Jeff Mindlin, *Chief Investment Officer*, **Arizona State University**
Jonas Muir Wood*, Portfolio Manager,* **Hiscox**
Elias Erickson, *Portfolio Manager, Quality Equities,* **Ninety One**

10:20–10:50

Coffee Break
East Foyer

Expert Corner with Coffee
Boardroom
Expert: To be announced

The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.

10:50–11:30

Private Markets Edge
Salon III

Is the Risk Worth the Reward in Private Markets?
For the first in the sectors short history, private market managers are finally being tested. From fundraising deceleration and new SEC regulations to talent wars and succession drama, the industry is undergoing a significant transformation. Our panel of experts will debate the prospective landscape of the industry and whether private markets continue to present an attractive proposition for LPs moving forward. What will the future hold for this evolving sector, and is the risk truly commensurate with the potential rewards?

Moderator:
To be announced
Panelists:
Jon-Michael Consalvo, *Chief Investment Officer,* **Carnegie Corporation of New York**
Mark Kheyfetz, *Investment Director*, **Yeshiva University**

Thematic & Alpha Investing Edge
Salon IV

Panel: The Improved Thematic Investment playbook – Expanding the pillars of innovation

- How can investors prioritize long-term sustainability and Innovation?
- How can managers incentivize true innovation beyond the traditional tech sectors?
- What strategies are shaping the future and how can investors capture the most lucrative opportunities?

Moderator:
To be announced

Panelists:
Kate Murtagh, *Managing Director and Chief Compliance Officer*, **Harvard Management Company**
Alex Torrens, *Head of North America*, **Walter Scott & Partners**

11:30–12:10

Private Markets Edge
Salon III

Turning Challenges into Opportunities: How Private Equity Uncovers Value in Uncertain Markets?
In today's unpredictable economic landscape, private equity stands out as a beacon of resilience. Despite facing a myriad of challenges, it possesses a unique ability to uncover value in uncertain markets, turning obstacles into lucrative opportunities. The speakers will discuss the strategies employed to navigate turbulent waters and capitalize on market volatility. From identifying undervalued assets to implementing innovative growth strategies, the panelists will share insights into how they leverage uncertainty to drive value creation.

Moderator: To be announced
Panelists:
Geoff Abrahams, *Investment Manager*, **The Harry and Jeanette Weinberg Foundation**

Thematic & Alpha Investing Edge
Salon IV

Panel: Building a Green Future: Fostering Sustainable Growth Through Climate-Resilient Strategies
- ❖ How to develop climate-resilient strategies to adapt to changing environmental conditions and minimize disruptions to operations and investments?
- ❖ How are catastrophe models and frameworks developed for calculating the impact of climate change?
- ❖ What the strategies that investors should consider when focusing on climate resilient technologies for the future?

Moderator: To be announced
Panelists:
To be announced

12:10–12:40

The Future of Investing
Grand Ballroom - Salon I & II

Building upon the morning sessions. two leading allocators will be discussing the future shape, challenges, and opportunities of the sector. During this wide-ranging conversation, Ashley Baum and Harisha Koneru Haigh will provide insights into emerging trends, innovative strategies, and potential disruptors in the investment landscape. They will explore the evolving dynamics shaping investor behavior and the implications for asset allocation.

Participants:
- Ashley Baum, *Director of Special Opportunities, Investment Management Division*, **Teacher Retirement System of Texas**
- Harisha Koneru Haigh, *Managing Director*, **Northwestern University**

Moderator: Julie Segal, *Editor*, **Institutional Investor**

12:40–1:55

Lunch
Atrium

1:55–2:35

Private Markets Edge
Salon III

The Need for Liquidity - Navigating Secondaries
In the private market realm, liquidity is increasingly crucial. Secondaries, albeit a small segment of the market, are experiencing rapid growth and are emerging as valuable tools for generating liquidity. Against the backdrop of the industry's liquidity constraints, it comes as no surprise that secondary funds outpaced all other asset classes in growth during 2023. In this session, our panel of experts will assess the

Thematic & Alpha Investing Edge
Salon IV

Maximizing Returns in Times of Economic Volatility: Are Hedge Funds the Answer?
- ❖ Have hedge funds regained popularity as a means of maximizing returns in volatile markets?
- ❖ How do hedge funds balance risk-taking with risk mitigation strategies to optimize returns in turbulent markets?
- ❖ How do hedge funds balance risk and risk mitigation to optimize returns in turbulent markets?

current landscape and future trajectory of the secondaries market, encompassing GP and LP led secondaries as well as continuation funds. Additionally, we will explore the implications of dormant exit markets and the potential outcomes when the 28,000 unsold companies are either sold or listed.

Moderator: To be announced
Panelists:
Ning Wang, *Principal Investment Manager*, **American Chemical Society**

Moderator: To be announced
Panelists:
Ryan Johnston, *Senior Analyst - Funds Alpha Team*, **State of Wisconsin Investment Board**
Kyle Stewart, *Investment Director*, **Children's Health System of Texas**

2:35–3:15

Private Markets Edge
Salon III

The Rise of Private Credit

- ❖ What are the key drivers behind the rise of private credit, and how have market dynamics evolved in recent years?
- ❖ Where are the most attractive investment opportunities within the private credit market?
- ❖ How can investors diversify their private credit portfolios for 2024 and beyond

Moderator:
Nimisha Srivastava, *Head of Investments, North America,* **WTW**
Panelists:
Senior Representative, **Star Mountain Capital (proposed)**

Thematic & Alpha Investing Edge
Salon IV

The Change in Hedge Fund Appetite
In the past year, there have been notable shifts in demand within hedge fund portfolios. While credit remains at the forefront in terms of strategy interest, both macro and multi-strategy have experienced a notable decline in demand after years of significant interest and inflow. Which strategies, sub-strategies, and geographies are currently favored in 2024, and how has allocator appetite evolved in recent years? Our panel will examine the past twelve months and discuss which strategies are likely to thrive in the current economic climate.

Moderator: David Sheng, *Managing Director - Portfolio Advisory,* **Aksia**
Panelists:
Benjamin Merrill, *Portfolio Manager,* **Montgomery County Employees Retirement System**

3:15–3:50

Private Markets Edge
Salon III

Best Ideas - The New Frontiers in Private Credit
Private credit investors and managers are exploring new and niche opportunities beyond traditional direct lending and distressed investing strategies. Private credit is gaining ground in new battlefield and geographics and taking market share from traditional banks and lenders. During this session, we will hear from four leading specialists who will be discussing the new niche areas which excite them the most.

Moderator: To be announced
Panelists:
James Fitzpatrick, *Chief Investment Officer,* **CQS| Manulife Investment Management**
Edwin Wilches, *CFA, Managing Director,* **PGIM Fixed Income**

Thematic & Alpha Investing Edge
Salon IV

The Value of Multi-Manager Hedge Funds?
With the rise of multi-manager hedge funds, this session aims to delve into the nuances of these funds, exploring their value proposition, operational mechanisms, and potential benefits for investors.

- ❖ How do multi-manager hedge funds adapt to different market conditions, and what is their track record across various market environments?
- ❖ What are the key considerations for investors when evaluating multi-strategy hedge funds?
- ❖ What role can multi-strategy hedge funds play within a diversified investment portfolio?

Moderator: To be announced
Panelists:
Preet Chawla, *Senior Director*, **Carnegie Corporation of New York**
Anupam Kathpalia, CFA, CAIA, *Associate Director,* **Memorial Sloan Kettering Cancer Center**

3:50–4:20	**Coffee Break** *East Foyer* **Expert Corner with Coffee** *Boardroom* **Expert:** To be announced The Expert Corner session promises to take a deep dive into the topic, offering nuanced perspectives, actionable strategies, and expert insights. Network with fellow attendees and gain actionable strategies to navigate today's dynamic markets.
4:20–5:00	**Panel Discussion:** ***New Era of Investments:* Adapting to Forces of Disruption for Long-Term Success** *Grand Ballroom - Salon I & II* **Moderator:** To be announced **Panelists:** Waymond E. Harris, *Senior Vice President, Treasurer*, **Blue Cross Blue Shield of Michigan**
5:00–5:30	**Founder Conversation – The Future of Investing** *Grand Ballroom - Salon I & II* Long gone are the days of “low interest rates, cheap capital, and high valuations.” After a 15 years period, the global private markets are finally at an inflection point and managers are having to promise and deliver creative portfolio solutions with higher returns. David Layton has spent the last two decades turning Partners Group into the global investment powerhouse that it is today. With $147 billion under management invested in private equity, private infrastructure, private real estate and private debt – there is no one better to discuss the future of the $13 trillion industry. **Moderator:** To be announced **In Conversation with:** To be announced.
5:30–6:30	**Hedge Fund Awards & AlphaEdge Recognition Cocktail Reception (Invite only)** *East Foyer* Join us for an opportunity to meet and network with the winners of the Next Generation Recognition and the Most Influential Women in Investment Management.
6:30	**Hedge Fund Awards & AlphaEdge Recognition Dinner** *Grand Ballroom – Salon I, II, III* Join us for a celebratory evening to recognize distinguished allocators for their accomplishments in investment leadership, innovation, and alpha generation.