



EVESTMENT INSTITUTIONAL INVESTMENT INTELLIGENCE CONFERENCE 2019

CONSULTANT AGENDA

Monday, March 18, 2019

05:30 – 07:30 PM **Welcome Reception**
Omni SunTrust Park

Tuesday, March 19, 2019

08:00 – 09:00AM **Breakfast**

09:00 – 10:00AM **How Diversity & Inclusion is Informing Manager Selection**
Rebecca Fender, CFA Institute
Erika Spence, eVestment

In the past year, CFA Institute, along with regulators and asset owners, has made diversity and inclusion a top priority, and increasingly, investment consultants are also factoring D&I into their manager due diligence.

A recent CFA Institute Future of Finance report indicates that 53% of CFA members say there is actually a strong business case for more diversity in the industry, but, despite this enthusiasm, incorporating D&I into the research process can prove difficult due to lack of transparent and consistent data.

During this interactive session, CFA Institute's Rebecca Fender, CFA and Erika Spence, eVestment's Lead Data Strategies, will discuss:

- Polling results from 300+ workshop participants on the current state of D&I at their firm, and self-assessments versus a global benchmark
- 20 recommendation actions for the industry to increase D&I
- Discussion of relevant diversity data that investment consultants can use in the manager research process to meet the evolving interests of asset owners

10:00 – 10:15 AM **Break**

10:15 – 11:30 AM **"Managing" Manager Research**
Chris Tinsley, eVestment
Daniel Brickhouse, eVestment

As an investment consultant, you rely on multiple data sources to conduct four dimensional manager research – People, Process, Portfolio and Performance. In this session, we'll review the challenges this creates, from the sheer volume and frequency of the intelligence gathered to the difficulty of organizing

diverse types of research (quantitative, qualitative, internal commentary, third-party, etc.). We'll also discuss compliance and audit risks inherent in unstructured approaches to managing research content, and why organic management on shared drives constrains a firm's ability to fully leverage the intellectual capital of its research talent. eVestment's Chis Tinsley, CFA, CAIA and Daniel Brickhouse, CAIA will lead the session.

11:30 – 12:00 PM **Break**

12:00 – 12:30 PM **Keynote Address: Navigating Digital Transformation**
Adena Friedman, CEO of Nasdaq

12:30 – 01:30 PM **Lunch**

01:30 – 02:00 PM **Break**

02:00 – 03:30 PM **Working Session: eVestment. Applied.**
Daniel Brickhouse, eVestment
John Alexander, eVestment

During this hands-on working session, eVestment coaches will improve your firm's efficiencies in three key research areas: 1) Finding the data you need; 2) detecting signals in data noise; and finally 3) getting data in the format you want. Session coaches are Daniel Brickhouse, CAIA, Product Strategist for Consultants, and John Alexander, CFA, Client Success Manager for Consultants and an 8-year veteran of institutional consulting with UBS.

03:45 – 05:30 PM **Social Hour with Emerging Managers**

Increasing numbers of institutional investors are instituting emerging manager programs and setting D&I criteria for manager searches. At the same time, consultants are interested in identifying new investment talents and capabilities; in fact, some have even established quotas for meeting new and niche managers. eVestment has dedicated this EI3 session to help facilitate your outreach with emerging managers, providing space, refreshments and a select manager roster. Prior to the conference, we'll be reaching out to understand how your firm defines the emerging manager profile, so the select managers invited to this social hour align with your interests. You'll also receive a list of attending emerging managers before the session.

06:00 – 09:00 PM **Taste of Atlanta: Local Food & Entertainment** *(Attendance Optional)*

About EI3:

EI3 is one of the institutional investment industry's most important conferences, connecting top investment consulting firms and emerging managers. Join us in Atlanta, GA on March 18-20, 2019.

Host Hotel: Renaissance Atlanta Waverly Hotel
2450 Galleria Parkway Southeast, Atlanta, GA 30339

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