

SESSIONS

EMEX AMERICAS: THE EMERGING MANAGER EXCHANGE AGENDA - 15/09/2022

Emex Americas: The Emerging Manager
Exchange

September 15, 2022
Grant Thornton
New York, NY

Conference Welcome and Registration

8:30am - 9:00am
Key Insights for Emerging Managers

Chair's Opening Remarks

9:00am - 9:10am
Key Insights for Emerging Managers

The Perfect Emerging Manager Pitch: What does it mean to have a well-articulated investment process?

9:10am - 9:45am
Key Insights for Emerging Managers

Participants

Adriana Ballard - Portfolio Manager, Employees Retirement System of Texas

Dimitri Sogoloff - CEO, Horton Point

Kasia Kostun - Senior Associate, Humla Ventures

Evan H. Katz - Managing Director, Crawford Ventures, Inc

How to Target and Communicate with Different Types of Investors

9:45am - 10:20am
Key Insights for Emerging Managers

Participants

Michelle Jacobi - Managing Director, Gatewood Capital Partners

Gary DiCenzo - Board and Investment Committee Member, Rhode Island College & Dramatists Guild Foundations

Michael Felman - President & CEO, MSF Capital Advisors

Key Insight on Managing Liquidity and Counterparty Risk

10:20am - 10:55am
Key Insights for Emerging Managers

Participants

David Tawil - Co-founder, Prochain Capital

Morning Break

10:55am - 11:25am
Key Insights for Emerging Managers

How Should Managers Adapt During High Growth Periods?

11:25am - 12:00pm
Key Insights for Emerging Managers

Participants

Curtis Yasutake - Vice President, Pacific Current Group

Adam Cohen - Managing Director, Head of ODD, Agility

Emerging Managers and ESG

12:00pm - 12:35pm
Key Insights for Emerging Managers

Participants

Curtis Spears - President & CEO, Andes Capital Group

Tax and Fund Structuring: Strategies for Operational Efficiency

12:35pm - 1:10pm
Key Insights for Emerging Managers

Participants

Jason Grunfeld - Partner & Head of Business Development, Kleinberg Kaplan

Lunch

1:10pm - 2:20pm

Opening Judge Discussion: Beyond Size and Performance - The Top 5 Ingredients Allocators Are Looking For?

2:20pm - 2:45pm
Emerging Manager Showcase

Participants

Jason Grunfeld - Partner & Head of Business Development, Kleinberg Kaplan

Cynthia Steer - Director and Chair of the Investment Committee, ICMA Retirement Corporation

Ami Samuels - Partner, Gatewood Capital Partners

Kenneth Gettinger - Chairman, KPG Capital Partners

Rapid Fire Presentations and Q&A

2:45pm - 4:15pm
Emerging Manager Showcase

Navigating Between Costs and Scalability from Day One

4:15pm - 5:15pm
Roundtable A

Managing Trading Complexities when working across multiple desks, regions, and asset classes

4:15pm - 5:15pm
Roundtable B

Marrying computers-to-humans: finding the successful balance as a quant

4:15pm - 5:15pm
Roundtable C

How Can Emerging Managers Attract Institutional Capital as it Flows into Crypto?

4:15pm - 5:15pm
Roundtable D

How to leverage technology and services so that it's a revenue driver and not just a cost?

4:15pm - 5:15pm
Roundtable E

Key Factors for a Well-defined Risk Management/Capital Preservation Framework

4:15pm - 5:15pm
Roundtable F

Emerging Manager Showcase Results Announced

5:15pm - 5:20pm

Chair's Closing Remarks

5:20pm - 5:30pm

Farewell Drinks Reception

5:30pm - 7:00pm

SCHEDULE

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TIME	EMERGING MANAGER SHOWCASE	KEY INSIGHTS FOR EMERGING MANAGERS	ROUNDTABLE A	ROUNDTABLE B	ROUNDTABLE C	ROUNDTABLE D	ROUNDTABLE E	ROUNDTABLE F
8:00AM		8:30am - Conference Welcome and Registration						
9:00AM		9:00am - Chair's Opening Remarks 9:10am - The Perfect Emerging Manager Pitch: What does it mean to have a well-articulated investment process? 9:45am - How to Target and Communicate with Different Types of Investors						
10:00AM		10:20am - Key Insight on Managing Liquidity and Counterparty Risk 10:55am - Morning Break						
11:00AM		11:25am - How Should Managers Adapt During High Growth Periods?						

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12:00PM		<p>12:00pm - Emerging Managers and ESG</p> <p>12:35pm - Tax and Fund Structuring: Strategies for Operational Efficiency</p>						
1:00PM	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch	1:10pm - Lunch
2:00PM	<p>2:20pm - Opening Judge Discussion: Beyond Size and Performance - The Top 5 Ingredients Allocators Are Looking For?</p> <p>2:45pm - Rapid Fire Presentations and Q&A</p>							
3:00PM								
4:00PM			<p>4:15pm - Navigating Between Costs and Scalability from Day One</p>	<p>4:15pm - Managing Trading Complexities when working across multiple desks, regions, and asset classes</p>	<p>4:15pm - Marrying computers-to-humans: finding the successful balance as a quant</p>	<p>4:15pm - How Can Emerging Managers Attract Institutional Capital as it Flows into Crypto?</p>	<p>4:15pm - How to leverage technology and services so that it's a revenue driver and not just a cost?</p>	<p>4:15pm - Key Factors for a Well-defined Risk Management/Capital Preservation Framework</p>

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