

SESSIONS

2021 AGENDA COMING SOON. PLEASE SEE THE 2020 DAY 1 AGENDA BELOW: - 09/11/2020

Inside ETFs
Canada

November 2021
Hilton
Toronto, ON

Welcome to Inside ETFs Canada 2020!

9:00am - 9:05am
Main Sessions

Participants

Presenter: Erin Wolfe - Editor & Conference Producer, Inside ETFs

Stay Calm: How Fixed Income ETFs Are Mitigating Uncertainty

9:05am - 9:45am
Main Sessions

Fixed income ETFs shocked the market with a meteoric rise in 2019 and eradicated major concerns as they matured. With expectations that the trend will continue, what makes these ETFs so attractive? In this immersive session, we discuss the best uses for these ETFs and their benefits in a bond portfolio.

Participants

Moderator: David Armstrong - Editor In Chief, Wealthmanagement.com

Speaker: Ahmed Farooq - Vice President, ETF Business Development, Franklin Templeton Canada

Speaker: Roger Rouleau - Vice President & Portfolio Manager, 1832 Asset Management

2020 A Record Breaking Year for ETFs

9:50am - 10:05am
Main Sessions

Steve Hawkins, Head of CETFA, will discuss how Canadian have embraced ETFs in a major way in 2020, despite the challenges of the Covid-19 pandemic. In the first eight months of 2020, ETF sales have already exceeded their record haul from 2019. Mr. Hawkins will discuss how ETFs are positioned now as the go-to investment for almost all major asset classes and sectors, ranging from traditional stock indices to popular new sectors such as emerging technology and cannabis.

Participants

Speaker: Steven Hawkins - Board Chair, Canadian ETF Association (CETFA)

Let's Get Out of Our Box

10:10am - 10:50am
Main Sessions

Historically, all-Canadian stock portfolios have been more volatile than portfolios with international diversification. In this exciting panel, our speakers discuss the latest emerging market ETFs being sold on the TSX and how spreading out could do you some good.

Participants

Moderator: Victor Ferreira - Investing Reporter, Financial Post

Speaker: Rob Duncan - Senior Vice President, Institutional Strategy & Portfolio Manager, Forstrong Global

Speaker: Lynette Lewis - Council Member and Consultant, GLG Consulting

Speaker: Daniel Straus - Director, ETFs & Financial Products Research, National Bank of Canada Financial Markets

Deep Dive Sessions

10:50am - 10:55am

The landscape of ETF products is wide and expansive, but our experts are making it more navigable and getting you the information, you need now! Join one of our one-of-a-kind deep-dive sessions to learn more!

Challenges and Opportunities in ESG Investing

10:55am - 11:25am
Deep Dive - Stream A

Momentum toward ESG investing has been steadily building over the past few years, despite the myth of an "ESG versus performance trade-off". With the recent market events and the coronavirus crisis, will ESG investing become more important? Join Invesco's Hussein Rashid, Vice President and ETF Strategist, and Margaret Dorn, Senior Director, ESG Product Strategy, North America from S&P Dow Jones Indices, as they discuss new challenges and opportunities around ESG investing in the years to come.

Participants

Speaker: Hussein Rashid - Vice President, ETF Strategist, Invesco Canada

Speaker: Margaret Dorn - Senior Director, ESG Product Strategy, North America, S&P Dow Jones Indices

Breaking Product Paradigms: Enhancing Income, Without Sacrificing Total Return

10:55am - 11:25am
Deep Dive - Stream B

Description: Finding income in today's investment landscape has become more important than ever, with government rates at historic lows, and looking to be lower for longer. Join Ben Gossack, lead portfolio manager of TGED and TUED ETFs, to discuss how he's using a proprietary active approach to enhance income using options.

Participants

Speaker: Benjamin Gossack - Vice President & Director, Portfolio Manager – Fundamental Equity, TD Asset Management

Looking Ahead in Emerging Market Equities – This Is Not A History Lesson

10:55am - 11:25am
Deep Dive - Stream C

Join us for a fresh and concise perspective on emerging market equities. Through a combination of financial, economic, and demographic storylines, we'll try to answer the question: What is the right strategic allocation to EM equities?

Participants

Speaker: Jordan Blain - Director of ETFs, Manulife Investment Management

Speaker: Jonathan d'Auvergne - Director of ETFs, Manulife Investment Management

ESG: A Rising Factor?

10:55am - 11:25am
Deep Dive - Stream D

Factor investing and ESG are two important trends in asset management. Over the past decade, there has been a rise in ESG awareness and associated ratings. Find out how high ESG quality portfolios have demonstrated lower tail risk, and catalysts for broader industry adoption going forward.

Participants

Moderator: Emily Anonuevo - Host and Digital Media Specialist, Fidelity Investments Canada

Speaker: Katrina Wilson - ETF Strategist, Fidelity

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2020 a Year in Review

11:25am - 12:05pm
Main Sessions

This year has been one for the books, with a global health pandemic that sent markets into a free-fall with a sharp bounce back that economists and strategists are still trying to classify. Markets have hit all-time highs, followed by meaningful pullbacks, just to come back even higher. What did this mean for investors? How did ETFs hold up through this volatility? We'll discuss 2020 from the lens of the ETF user; how NAV deviations in volatile markets have affected trading; how using ETFs has insulated client portfolios from concentration risk and many more insights into the Canadian ETF landscape regarding one of the most volatile years since 2008.

Participants

Moderator: Tammy Cash - Co-Head of The Canadian Chapter, Women In ETFs

Speaker: Kalee Boisvert - Financial Advisor, Raymond James

Speaker: Vivian Hsu - Director, ETFs, Fidelity

Speaker: Sucheta Rajagopal - Investment Advisor & Portfolio Manager, Mackie Research Capital

Speaker: Dina Ting - Senior Vice President, Head of Global Index Portfolio Management, Franklin Templeton

Evolving With ESG: What We Do Today, Matters Tomorrow

12:10pm - 12:40pm
Main Sessions

Interest in ESG products has continued to grow during the global pandemic. Global assets invested in ETPs focusing on ESG issues recently surpassed \$100 billion USD as the transition to a sustainable economy continues to gain momentum and lead to attractive investment opportunities. In this session, we'll explore the evolution of ESG and how it could look in a post-COVID-19 world. You'll learn how a disciplined approach to uncovering thematic, sustainable growth opportunities could help investors build more resilient portfolios while also making a positive social or environmental impact.

Participants

Speaker: Martin Grosskopf, MBA, MES - Vice-President and Portfolio Manager, Sustainable Investing, AGF Investments Inc.

Networking Lunch

12:40pm - 1:25pm

Peer to Peer: Strategies For Success

1:25pm - 2:05pm
Main Sessions

Every day, we create portfolios for our investors, but questions remain: Are we going about it the right way? Where are we allocating client assets? What strategies are we not thinking about? Look no further, because our team of experts have the answers to these very questions to help make you invaluable to your clients.

Participants

Moderator: Pablo Fuchs - Editor, Globe Advisor at The Globe and Mail

Speaker: Grant White - President, Endeavour Wealth Management

Speaker: John De Goey - Portfolio Manager, Wellington-Altus Private Wealth Inc.

Speaker: Linda Shick - Senior Vice President, Portfolio Manager, Raymond James

Balancing Act: Walking the Tightrope of ETF Innovation

2:10pm - 2:40pm
Main Sessions

Creating an innovative ETF while simultaneously solving clients' problems isn't easy. Trevor Cummings, VP, ETF distribution from TD Asset Management, will discuss what TD is doing to help walk this tightrope. Hint: Breaking product paradigms and assisting in the creation of a bespoke custom index may be required. Tune in to hear more from TD Asset Management.

Participants

Speaker: Trevor Cummings - Vice President, ETF Distribution, TD Asset Management

Multi Vs. Single Factors: What's The Best Approach?

2:45pm - 3:25pm
Main Sessions

Deviating from a traditional cap-weighted portfolio can be troubling for any advisor. Whether you're looking to take a single-factor approach to drive performance or a multifactor approach to get a well-balanced return, there can be pros and cons to both. In this discussion, our speakers embrace new and innovative ideas ranging from single- multifactor portfolios, using factor tilts and investing in single- and multifactor ETFs.

Participants

Moderator: Melissa Shin - Editorial Director, Advisor's Edge & Investment Executive

Speaker: Alan Fustey - Portfolio Manager, ETF Strategist, Adaptive ETF, a division of Bellwether Investment Management Inc.

Speaker: Michael Nairne - President and Chief Investment Officer, Tacita Capital

Networking Break & Roundtables

3:25pm - 3:30pm

The education never stops, and we are bringing you even more thought leadership from the best in the business. Join us for our intimate round-table sessions discussing the latest and greatest topics in the ETF industry!

Product Due Diligence on Thematic ETFs

3:30pm - 4:00pm
Roundtable - Stream A

With the rapid growth in Thematic ETFs as a burgeoning segment within the broader ETF industry, investors have an ever more pressing need to understand what is "under the hood" for various thematic products. Some key questions to ask include what the exact exposure is the basket of stocks give you, how does the ETF fit in your total portfolio, and whether there is overlap with other allocations you may already have. In this session, we highlight several important considerations for Advisors when it comes to choosing Thematic ETFs, while walking through a few concrete product examples.

Participants

Speaker: Warner Wen - Research Director, Canada, Global X ETFs

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An Active Approach to Global Growth

3:30pm - 4:00pm
Roundtable - Stream B

Actively managed ETFs represent a niche but growing segment of the ETF landscape in Canada. That's also the case with Franklin Templeton, which has just introduced one of its high conviction 5-star Morningstar-rated mutual fund strategies as an ETF—Franklin Global Growth Active ETF (FGGE). Ahmed Farooq, Vice President, ETF Business Development, Franklin Templeton Canada, will discuss this strategy and its impressive track record in this special roundtable discussion.

Participants

Speaker: Ahmed Farooq - Vice President, ETF Business Development, Franklin Templeton Canada

2020 US Election: 10 Truths No Matter Who Wins

4:00pm - 4:30pm
Main Sessions

Coronavirus has upended the traditional cadence of an American presidential election year. While the 2020 election will have a momentous impact on the country, one area of caution for investors is drawing too many links to the world of investing. Join Invesco's Global Market Strategist, Brian Levitt, as he examines the state of the current U.S. business cycle and historical market performance around elections.

Participants

Speaker: Brian Levitt - Global Market Strategist, Invesco

ESG: Constructing for Good

4:35pm - 5:15pm
Main Sessions

When it comes to portfolio construction, are we using an even mix of E, S and G products, or is one better than the other? Are we using ESG products or SRI products, and how do you tell the difference? Join us as our thought leaders explain what it means to quantify and rate ESG, while also providing strategies on how best to incorporate these offerings into your clients' portfolios.

Participants

Moderator: Pat Dunwoody - Executive Director, Canadian ETF Association

Speaker: Judy Cotte - Chief Executive Officer, ESG Global Advisors

Speaker: Guillermo Cano - Executive Director, Equity Solutions, MSCI

Speaker: Linda Ma - Analyst, ETFs & Financial Products, National Bank of Canada Financial Markets

The Man Who Solved The Market: How Jim Simons Launched The Quant Revolution

5:15pm - 5:55pm
Main Sessions

Join Gregory Zuckerman, special writer to the Wall Street Journal, as he discusses how Jim Simons and a group of unlikely mathematicians solved the market and launched a quantitative revolution. Hear lessons, insights and stories from the world's greatest trader, and how an unexpected revolution transformed the world of investing.

Participants

Speaker: Greg Zuckerman - Special Writer, The Wall Street Journal

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9:00AM					<p>9:00am - Welcome to Inside ETFs Canada 2020!</p> <p>9:05am - Stay Calm: How Fixed Income ETFs Are Mitigating Uncertainty</p> <p>9:50am - 2020 A Record Breaking Year for ETFs</p>		
10:00AM	<p>10:50am - Deep Dive Sessions</p> <p>10:55am - Challenges and Opportunities in ESG Investing</p>	<p>10:50am - Deep Dive Sessions</p> <p>10:55am - Breaking Product Paradigms: Enhancing Income, Without Sacrificing Total Return</p>	<p>10:50am - Deep Dive Sessions</p> <p>10:55am - Looking Ahead in Emerging Market Equities – This Is Not A History Lesson</p>	<p>10:50am - Deep Dive Sessions</p> <p>10:55am - ESG: A Rising Factor?</p>	<p>10:10am - Let's Get Out of Our Box</p> <p>10:50am - Deep Dive Sessions</p>	<p>10:50am - Deep Dive Sessions</p>	<p>10:50am - Deep Dive Sessions</p>
11:00AM					<p>11:25am - 2020 a Year in Review</p>		
12:00PM	<p>12:40pm - Networking Lunch</p>	<p>12:40pm - Networking Lunch</p>	<p>12:40pm - Networking Lunch</p>	<p>12:40pm - Networking Lunch</p>	<p>12:10pm - Evolving With ESG: What We Do Today, Matters Tomorrow</p> <p>12:40pm - Networking Lunch</p>	<p>12:40pm - Networking Lunch</p>	<p>12:40pm - Networking Lunch</p>
1:00PM					<p>1:25pm - Peer to Peer: Strategies For Success</p>		
2:00PM					<p>2:10pm - Balancing Act: Walking the Tightrope of ETF Innovation</p> <p>2:45pm - Multi Vs. Single Factors: What's The Best Approach?</p>		

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3:00PM	3:25pm - Networking Break & Roundtables	3:25pm - Networking Break & Roundtables	3:25pm - Networking Break & Roundtables	3:25pm - Networking Break & Roundtables	3:25pm - Networking Break & Roundtables	3:25pm - Networking Break & Roundtables 3:30pm - Product Due Diligence on Thematic ETFs	3:25pm - Networking Break & Roundtables 3:30pm - An Active Approach to Global Growth
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Opening Remarks

9:00am - 9:05am
Main Sessions

Participants

Presenter: Andrew Baranich - Community Manager, Inside ETFs

Big Ideas 2020: A Look Into the Convergence, Market Potential, and Long-Term Impact of Disruptive Innovation

9:05am - 9:35am
Main Sessions

Emerge ARK ETFs are sub advised by ARK Investment Management LLC in New York City. ARK Invest specializes in thematic investing in disruptive innovation, the firm is rooted in over 40 years of experience in identifying and investing in innovations that should change the way the world works. Big Ideas Report 2020 is a compilation of ARK's "Big Ideas" for 2020. This is an annual research report that highlights the latest developments in innovation and offers some of ARK's most provocative research conclusions for the coming year. The EmERGE ARK ETF's are proud to sponsor with ARK Invest as their subadvisor and are happy to have Ren Leggi, Client Portfolio Manager speaking on behalf of ARK and their ideas at the forefront of innovation.

Participants

Speaker: Renato Leggi - Client Portfolio Manager, ARK Investment Management

Peer to Peer: Tee Up Your Tech

9:40am - 10:20am
Main Sessions

When it comes to our practices, what tools are we using to enhance client experiences? How are we leveraging databases, technology, applications, and CRM to help keep our clients organized and drive their returns? Hear from our distinguished panel of tech providers and consultants to find out!

Participants

Moderator: Davis Janowski - Senior Technology Editor, WealthManagement.com

Speaker: Jeff Gans - Chief Executive Officer, Purpose Advisor Solutions

Speaker: Clive Cholerton - Executive Partner, Quintessence Wealth

Speaker: Robert Di Iorio - Vice President & Portfolio Manager, RBC Dominion Securities

Deep-Dive Sessions

10:20am - 10:25am

The landscape of ETF products is wide and expansive, but our experts are making it more navigable and getting you the information, you need now! Join one of our one-of-a-kind deep-dive sessions to learn more!

Emerge ARK ETFs: Canada's Leading Innovation ETFs

10:25am - 10:55am
Deep Dive - Stream A

Emerge partnered with ARK Invest just over a year ago to bring to Canada the famous ARK ETFs in a Canadian domiciled product. EmERGE offers a top-of-the-line innovation strategy made for Canadians, offered in both CAD and USD. We want to dig deeper with you how you can invest in innovation, what sets the EmERGE ARK ETFs apart, what to expect, and why we, here at EmERGE, are so very excited about the investment strategies we have to offer. Lisa Lake Langley, President/CEO, EmERGE Canada Inc. is happy to answer any questions you may have and is looking forward to speaking with you regarding the unique investment process and research of the EmERGE ARK ETFs.

Participants

Speaker: Lisa Lake Langley - President & CEO, EmERGE

The Global Sustainable Growth Equity Strategy

10:25am - 10:55am
Deep Dive - Stream B

Join AGF's Jonathan Lo, Vice-President and Client Portfolio Manager and Vishal Bane, Associate Portfolio Manager of the AGF Global Sustainable Growth Equity Fund for an overview of the sustainable investment landscape and an introduction to one of Canada's first sustainable investment strategies.

They will introduce the sustainable investing landscape and how to approach conversations around sustainable opportunities with your clients. Jonathan and Vishal will examine how they uncover growth opportunities across four major sustainable themes: energy and power technologies, water/wastewater solutions, waste management and pollution control, and health and well-being.

Participants

Speaker: Vishal Bane - Associate Portfolio Manager, AGF Investments Inc.

Speaker: Jonathan Lo - Vice-President and Client Portfolio Manager, AGF Investments Inc.

MBS – An Emerging Allocation in Canadian Fixed Income

10:25am - 10:55am
Deep Dive - Stream C

Fully insured. AAA-rated. Canadian National Housing Act mortgage-backed securities (NHA MBS) backed by the Canada Mortgage Housing Corporation (CMHC) have become a sizable portion of the Canadian fixed income market. In 2020, FTSE Russell has launched the first transparent Canada mortgage-backed securities index – FTSE Canada NHA MBS 975 Index – to provide access to the asset diversification, risk mitigation, and yield opportunities of the Canada mortgage bond market. Adding to its lineup of Canadian fixed income ETFs, BMO Asset Management introduced the Canada's first MBS ETF that tracks the FTSE Canada NHA MBS 975 Index.

Participants

Speaker: Chris Jenkins - Director, North America ETP Strategy and Business Development, FTSE Russell

Speaker: Marina Mets - Managing Director, FTSE Russell

Speaker: Mark Raes - Managing Director, Head of Product Management & ETF Business Development, BMO

Getting Into the Green Routine

10:55am - 11:35am
Main Sessions

In 2020, taking care of the environment and being socially responsible is not just a suggested practice, it's the new normal. In this robust conversation, our panelists discuss how the more we create and invest in ESG strategies, the healthier our world—and financial markets—will be.

Participants

Moderator: Anita Sharma - Anchor, Market Call Tonight, BNN Bloomberg

Speaker: David O'Leary - Founder & Principal, Kind Wealth

Speaker: Margaret Dorn - Senior Director, ESG Product Strategy, North America, S&P Dow Jones Indices

Speaker: Mary Hagerman - Portfolio Manager, Investment Advisor, Raymond James

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Considering The Outlook for Canadian Markets in 2021

11:40am - 12:20pm
Main Sessions

In this unique presentation, Philip Lawlor of FTSE Russell takes stock of the status of the economic, credit, valuation and profit cycles confronting markets after a year of Covid volatility. He will also examine how markets and policy makers recalibrate to macro paradigm shifts - the Japanese lesson.

Participants

Speaker: Philip Lawlor - Managing Director Global Markets Research, FTSE Russell

Liquid Alts: Gauging the Impact

12:25pm - 1:05pm
Main Sessions

It's been roughly a year since liquid alts hit the ETF market, and many of us want to know if they've delivered on their promises. Have they helped us to better hedge our portfolios and prepare for an inevitable market downturn, or are there still better, more liquid ways to diversify? Join our group of analysts to find out!

Participants

Moderator: Shana Sissel - Chief Investment Officer, Spotlight Asset Group

Speaker: Marc-André Gaudreau - Vice President & Senior Portfolio Manager, 1832 Asset Management

Speaker: Francis Sabourin - Director, Wealth Management, Portfolio Manager, Richardson GMP

Networking Lunch

1:05pm - 1:20pm

Factor Behaviors: Portfolio Ideas to Navigate Through Volatile Markets

1:20pm - 1:50pm
Main Sessions

Historically, equity style factors have exhibited different return profiles during drawdown and recovery periods. Learn how equity style factors can help investors achieve their investment objectives in various market environments through opportunistic or strategic exposure.

Participants

Speaker: Vivian Hsu - Director, ETFs, Fidelity

Thinking About Thematics

1:55pm - 2:35pm
Main Sessions

With so many niche ETFs coming to the market, how do we know which ones will perform and which will fizzle out? Our experts talk about the strongest themes pushing portfolios forward in 2020, and how much they're expected to drive returns over the next 10 years.

Participants

Moderator: Clare O'Hara - Wealth Management Reporter, The Globe and Mail

Speaker: Jay Jacobs - Senior Vice President, Head of Research & Strategy, Global X ETFs

Speaker: Ben Johnson - Director of Global ETF Research, Morningstar

Speaker: Mark Noble - Executive Vice-President, ETF Strategy, Horizons ETFs Management (Canada) Inc.

Roundtables & Networking Break

2:35pm - 2:40pm

The education never stops, and we are bringing you even more thought leadership from the best in the business. Join us for our intimate round-table sessions discussing the latest and greatest topics in the ETF industry!

Could A Smaller Preferred Share Market Mean Bigger Returns?

2:40pm - 3:10pm
Roundtable - Stream A

This breakout session will focus on the dramatic shift in the Canadian preferred share market with the recent introduction of Limited Recourse Capital Notes (LRCNs), which over the next couple of years could potentially replace a large proportion of the Canadian preferred share market. This potentially provides price support for preferred shares, particularly if there are fewer preferred shares available, and makes them potentially more attractive for income-focused investors in a low-interest rate environment. This presentation will address how LRCNs work, how they are impacting the broader preferred share market and will provide an overview on how preferred ETFs can potentially further improve investing in preferred shares by providing potentially more liquid and diversified access to this asset class.

Participants

Speaker: Julia Howe - Vice-President, Business Development, Horizons ETFs Management (Canada) Inc.

Overcoming Home Sector Biases with U.S. Equities

2:40pm - 3:10pm
Roundtable - Stream B

U.S. equities represent a sizeable chunk of the global equity capitalization, with pronounced representation in several global sectors. Join S&P Dow Jones Indices' Hamish Preston as he examines the global relevance of U.S. equities, how U.S. exposure can help to diversify domestic sector biases, the importance of index construction, and the potential benefits of taking an index-based approach.

Participants

Speaker: Hamish Preston - Associate Director, S&P Dow Jones Indices

The 3 P's Of Investing In This Market

3:10pm - 3:40pm
Main Sessions

For investors focused on long-term success, a contextual view of the market is crucial in helping make good decisions. Here we offer the truths and realities of the current state of the market, and what investors should pay attention to as an uncertain recovery keeps everyone on the edge of their seats.

Participants

Speaker: Kevin Headland - Senior Investment Strategist, Manulife Investment Management

The Rise Of Gold

3:45pm - 4:15pm
Main Sessions

Gold has recently hit an all-time high and investors are asking where it will go from here. This volatile market paired with the global pandemic and the US elections, have certainly escalated uncertainty.

We will take a deep dive in examining the following topics:

- The Outlook for Gold
- A Historical Performance Perspective
- Inflation, Central Bank Action, & Monetary Policy Effects
- Portfolio Allocation Considerations

Participants

Speaker: Bobby Eng - Head of SPDR ETFs Canada, State Street Global Advisors

Speaker: Maxwell Gold - Head of Gold Strategy, State Street Global Advisors

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The Short & The Long: 2030 & What We Need to Get There

4:20pm - 5:00pm
Main Sessions

It's time to look toward our global outlook over the next 10 years and the super trends that are bound to have an effect on every investors portfolio. Our expert panelists explain the changes you'll need to anticipate and the strategies you'll need for success in one year, five years and 10 years to come.

Participants

Moderator: Todd Rosenbluth - Senior Director, ETF & Mutual Fund Research, CFRA

Speaker: Martin Lefebvre - Vice-President, Chief Investment Officer and Strategist, National Bank of Canada

Speaker: Tyler Mordy - President & Chief Investment Officer, Forstrong Global

Speaker: Mike Philbrick - Chief Executive Officer, ReSolve Asset Management SECZ (Cayman).

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