AGENDA

SMART BETA: the 360° overview

Incorporating Smart Beta in your asset allocation

<u>Day 1 - Sep. 23 (Wed)</u>

10.30-11 am Registration

11-11.10 am STOXX/CFA Welcome

11.10-11.40 am Opening keynote
Sara Shores, head investment strategy for factor-based strategies group and global head of smart beta, BlackRock
The art and science of smart beta investing

11.45-12.15 pm Dr. Andreas Sauer, CEO, Ansa Capital Management
Is smart beta really that smart, inexpensive and good for investors?

12.15-1.30 pm
Lunch, networking

1.30-2 pm Yves Choueifaty, head of quantitative asset management Europe, TOBAM
"Passive Management", the perfect oxymoron?

2-2.30 pm Andrew Lapthorne, quant strategist, Société Générale
Smart beta investing – from academic theory to actual implementation

2.30-3.30 pm
Roundtable and Q&A with all speakers of the day moderated by Paul Amery, financial journalist in London

3.30 pm
Coffee break, networking and departure for evening event

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Day 2 - Sep. 24 (Thu)

10-10.30 am Registration

10.30 am STOXX/CFA Welcome

10.35-11.05 am Johanna Treeck, senior ECB correspondent, MNI
"Light at the end of the tunnel?"
Outlook on the recovery and monetary policy

11.05-11.35 am Satoshi Sakamaki, chief manager investment planning group, MUFG
Corporate governance reform and Japan's equity market

11.35-1 pm
Lunch, networking

1-1.30 pm Angelika Bolliger, head of market development, STOXX and Todd Mathias, vice president, BlackRock
Workshop - How is a smart beta index created?

1.30-1.50 pm Erol Steiner, managing director, Crossflow Financial Advisors
Differences among regular trading, ETF trading, smart beta trading

1.50-2.30 pm Thomas Meier, head of equities team, MainFirst Asset Management and Konrad Sippel, global head of business development, STOXX
Active vs. Passive – Showcase: Dividends

2.30-3.30 pm
Roundtable and Q&A with all speakers of the day moderated by Paul Amery, financial journalist in London

3.30 pm
Break, networking, event ends

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