WORLD INVESTMENT FORUM 2018

PRELIMINARY DELEGATE AGENDA | MAY 20 – 23 ~ MONTAGE DEER VALLEY

SUNDAY, MAY 20 | Welcome

12:00p **Event Check-In , Activity Registration & Barbecue|** Grand Terrace

1:30p **Welcome to Montage Deer Valley and the World Investment Forum |** Mark Makepeace, Chief Executive, FTSE Russell | Grand Ballroom

1:35p **2018 Smart Beta Survey Findings from Asset Owners |** Rolf Agather, MD North America Research, FTSE Russell

2:00p **Fixed Income & Smart Beta |** Arom Pathammavong, MD Head of Yield Book Indices, FTSE Russell

3:00p **Yield Book Q|** Richard Burns, CEO Yield Book, FTSE Russell

3:45p **Refreshment Break |** Grand Promenade

4:15p **Hacking Finance |** Professor Campbell Harvey, Duke University

5:15p **Time at Leisure**

7.00p **Welcome Reception & Dinner | Vista Lounge & Terrace**
Featuring live entertainment

MONDAY, MAY 21

7:00 **Breakfast for Speakers & Delegates** | Grand Promenade & Terrace

8:00 **Welcome and Opening Remarks** | Chris Woods, Managing Director, Governance, Risk & Compliance, FTSE Russell

8:05 **ESG|** Professor Don Keim, Wharton, University of Pennsylvania

9:00 **Shareholder Engagement :Interaction Between Activists and Institutional Investors |** Professor Wei Jang, Columbia Business School

10:00 Refreshment Break | Grand Promenade

10:30 **ESG Panel| Professor Elroy Dimson,** Judge Business School, Cambridge University & Jack Ehnes, Chief Executive, CalSTRS

11:30 **Educational Session TBC**

12:30p **Lunch Available |** Grand Promenade & Terrace
Working Educational Lunch Session, Academic Insights Track: Cryptocurrencies | Professor Campbell Harvey, Duke University

MONDAY, MAY 21 (ct.)

1:30p **Currency Returns |** Professor David Chambers, Judge Business School, Cambridge University

2:00p **Currency Panel: Bitcoin vs SDR vs WPU | Ron Liesching, Chairman, Mountain Pacific Group**

3:00p **Networking Sessions (off site)**

6:00p **Guests back on site from Networking Sessions, Time at Leisure**

7:00p **Reception & Dinner** | Vista Lounge & Terrace
Featuring live entertaiment

TUESDAY, MAY 22

7:00 **Breakfast for Speakers & Delegates** | Grand Promenade & Terrace
Educational Breakfast Session: TBC

8:00 **False and Missed Discoveries in Financial Economics|** Professor Campbell Harvey, Duke University

9:00 **Active Fundamental Performance: A New Way to Select Managers |** Professor Lu Zheng, University of California, Irvine

10:00 **Morning Refreshment Break** |Grand Promenade

10:30 **Financial Advisers Value of Their Advice|** Professor Keith Brown, McCombs Business School, University of Texas Austin

11:00 **Fixed Indexed Annuities|** Professor Roger Ibbotson, Yale University

11:45 **Funds of Funds** | Marty Gruber, Stern School of Business New York University

12:15p **Lunch Available** | Grand Promenade & Terrace
Working Educational Lunch Sessions, TBC

1:30p **Networking Sessions**

4:30p **ETF Panel |** Moderated by Professor Reena Aggarwal, Georgetown University

5:15p **Educational Session TBC**

7:00p **Cocktail Reception & Dinner| Empire Canyon Lodge**
Featuring live entertainment

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WEDNESDAY, MAY 23

7:00	**Breakfast for Speakers & Delegates** | Grand Promenade & Terrace **Educational Breakfast Session TBC**
8:00	**Mimicking Portfolios**| Professor Richard Roll, CalTech
9:00	**Behavioral Finance Panel |** Professor George Constantinides, The University of Chicago Booth School of Business
10:30	**Refreshment Break** | Grand Promenade
11:00	**Keynote Harry Markowitz |** Outperforming
12:15p	**Closing Remarks -** Chris Woods, Managing Director, Governance, Risk & Compliance, FTSE Russell
12:30p	**Closing Luncheon** | Apex Dining Room & Terrace
1:30p	**WORLD INVESTMENT FORUM 2018 CONCLUDES**