

S&P DJI Canadian ETF Masterclass: Building a More Resilient Core

A complimentary virtual event for investment professionals

DATE: Thursday, November 19, 2020

TIME: 11:00 AM – 1:30 PM EST

11:00 AM – 11:05 AM INTRODUCTION & WELCOME

Travis Robinson, CFP, Senior Director, Head of Canada Financial Advisor Channel Management, S&P Dow Jones Indices

11:05 AM – 11:25 AM EVOLUTION IN INVESTMENT MANAGEMENT. WHAT IS HAPPENING, AND WHY?

Keynote Speaker: Craig Lazzara, CFA, Managing Director and Global Head of Index Investment Strategy, S&P Dow Jones Indices

11:25 AM – 11:45 AM WHAT'S THE ROLE OF U.S. CORE IN CANADA?

Moderator: Travis Robinson, CFP, Senior Director, Head of Canada Financial Advisor Channel Management, S&P Dow Jones Indices

Panelists:

- **Hamish Preston**, Associate Director, U.S. Equity Indices, S&P Dow Jones Indices
- **Erika Toth**, CFA, Director, Institutional & Advisory, Eastern Canada, BMO Global Asset Management

11:45 AM – 12:45 PM EXPLORING CORE APPLICATIONS FOR ESG

Moderator: Jenna Dagenhart, Program Anchor, Asset TV

Panelists:

- **Margaret Dorn**, Senior Director, ESG Product Strategy, North America, S&P Dow Jones Indices
- **Graham Mackenzie**, Head, Exchange Traded Products, TMX Group
- **Hussein Rashid**, Vice President, ETF Strategist, Invesco Canada
- **An-lap Vo-Dignard**, Senior Vice President – Portfolio Manager and Investment Advisor, The Vo-Dignard Provost Group, National Bank Financial
- **Charles Qi**, CFA, Director, Institutional Structuring Group, CIBC Capital Markets

12:45 PM – 1:05 PM HOW INDEXING HAS SIMPLIFIED FACTOR INVESTING

Moderator: Shaun Wurzbach, Managing Director and Global Head of Financial Advisor Channel Management, S&P Dow Jones Indices

Panelists:

- **Pavel Vaynshtok**, CFA, Managing Director and Global Head of Strategy Indices, S&P Dow Jones Indices
- **Andrew Neatt**, Investment Advisor and Portfolio Manager, Naas Neatt Physician Wealth Management, TD Wealth Private Investment Advice

1:05 PM – 1:25 PM UNDERSTANDING THE MARKET IMPACT OF THE U.S. ELECTION

Keynote Speaker: Sam Stovall, CFP, Chief Investment Strategist, CFRA, Equity and Fund Research

1:25 PM – 1:30 PM CLOSING REMARKS

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Agenda subject to change.