

VIRTUAL AGENDA

FOCUS Day 1 – Thursday, October 16, 2025

FOCUS

Clarity drives success

8:00 a.m. ET WELCOME TO OUR VIRTUAL ATTENDEES

8:20 a.m. ET **Welcome remarks**
David Bushnell, *Senior Vice President, Advisor National Sales*

SEGMENT 1

8:30 a.m. ET **Concentrated investing in U.S. equities**
Stephen DuFour, *Portfolio Manager*

9:00 a.m. ET **Asset allocation update: A global perspective**
David Wolf, *Portfolio Manager* | David Tulk, *Portfolio Manager*
Ilan Kolet, *Institutional Portfolio Manager*

9:40 a.m. ET **EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.**

SEGMENT 2

9:50 a.m. ET **The industrial revolution (finally) comes to investing**
Neil Constable, *Head of Quantitative Research and Investments*

10:20 a.m. ET **The power of dividend investing**
Ramona Persaud, *Portfolio Manager*

10:50 a.m. ET **EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.**

SEGMENT 3

11:00 a.m. ET **Harnessing quality across global markets**
Patrice Quirion, *Portfolio Manager*

11:30 a.m. ET **State of the market**
Jurrien Timmer, *Director, Global Macro*

12:10 p.m. ET **EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.**

SEGMENT 4

1:10 p.m. ET **Lessons learned**
Will Danoff, *Portfolio Manager* | Nidhi Gupta, *Portfolio Manager*
Matthew Drukker, *Portfolio Manager*

1:50 p.m. ET **The vast opportunity set in micro-caps**
Salim Hart, *Portfolio Manager*

2:30 p.m. ET **EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.**

SEGMENT 5

2:40 p.m. ET **Income in action**
Adam Kramer, *Portfolio Manager*
Scott Mensi, *Institutional Portfolio Manager*

3:15 p.m. ET **Regulatory update**
Andrea Rigobon, *Director, Procurement and Senior Legal Counsel,*
Chief Privacy Officer

3:45 p.m. ET **Day 1 closing remarks**
Alex Gabrini, *Vice President, Regional Sales*

4:00 p.m. ET **VIRTUAL CLOSE**

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FOCUS Day 2 – Friday, October 17, 2025

8:00 a.m. ET WELCOME TO VIRTUAL ATTENDEES

8:30 a.m. ET Day 2 opening remarks
David Bushnell, *Senior Vice President, Advisor National Sales*

SEGMENT 6

8:40 a.m. ET Innovative investment strategies with the help of ETFs
Étienne Joncas-Bouchard, *Director, ETF and Alternatives Strategy*

9:20 a.m. ET Sector watch: Market trends
Denise Chisholm, *Director of Quantitative Market Strategy*

10:00 a.m. ET EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW.

SEGMENT 7

10:10 a.m. ET Uncovering hidden gems: Intrinsic value investing
Morgen Peck, *Portfolio Manager*
Sam Chamovitz, *Portfolio Manager*

10:50 a.m. ET Staying resilient in turbulent markets
Daniel Dupont, *Portfolio Manager*

11:30 a.m. ET EXCLUSIVE VIRTUAL SESSION. DETAILS TO FOLLOW

SEGMENT 8

11:40 a.m. ET Navigating the world of fixed income
Michael Plage, *Portfolio Manager*

12:10 p.m. ET Investing against the grain
Hugo Lavallée, *Portfolio Manager*

12:50 p.m. ET Summary and conference close
Alex Gabrini, *Vice President, Regional Sales*

1:05 p.m. ET VIRTUAL CLOSE

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