

## CONFERENCE DAY 1

Thursday, October 12, 2023

8:10 a.m. – 8:20 a.m. ET

**Welcome to our virtual attendees**

8:20 a.m. – 8:30 a.m. ET

**Welcome remarks**

David Bushnell, *Senior Vice President, Advisor National Sales*

### SEGMENT 1

8:30 a.m. – 9:10 a.m. ET



**A tactical approach to income investing**

**SPEAKERS:** Adam Kramer, *Portfolio Manager*  
Scott Mensi, *Portfolio Manager*

**MODERATOR:** Pat Bolland

9:10 a.m. – 9:50 a.m. ET



**An alternative perspective**

**SPEAKERS:** Brett Dley, *Portfolio Manager*  
David Way, *Portfolio Manager*

**MODERATOR:** Rory Poole

9:50 a.m. – 10:05 a.m. ET

**Exclusive virtual session**

Details to follow.

### SEGMENT 2

10:05 a.m. – 10:45 a.m. ET



**Paying dividends with active management**

**SPEAKER:** Don Newman, *Portfolio Manager*

**MODERATOR:** Pat Bolland

## CONFERENCE DAY 1 *(continued)*

Thursday, October 12, 2023

10:45 a.m. – 11:25 a.m. ET



### Global asset allocation outlook

**SPEAKERS:** David Wolf, *Portfolio Manager*  
David Tulk, *Portfolio Manager*  
Ilan Kolet, *Institutional Portfolio Manager*

**MODERATOR:** Kathryn Black

11:25 a.m. – 12:10 p.m. ET



### Fixed income now

**SPEAKERS:** Jeff Moore, *Portfolio Manager*  
Stacie Ware, *Quantitative Analyst*

**MODERATOR:** Pat Bolland

12:10 p.m. – 1:10 p.m. ET



### Exclusive extended virtual session

Details to follow.

## SEGMENT 3

1:10 p.m. – 1:55 p.m. ET



### CIO insights: The evolving market landscape

**SPEAKER:** Andrew Marchese, *Chief Investment Officer and Portfolio Manager*

1:55 p.m. – 2:35 p.m. ET



### Fidelity's research: A competitive advantage

**SPEAKER:** Reetu Kumra, *Director of Research and Portfolio Manager*

**MODERATOR:** Kathryn Black

2:35 p.m. – 2:50 p.m. ET



### Exclusive virtual session

Details to follow.

## CONFERENCE DAY 1 *(continued)*

Thursday, October 12, 2023

2:50 p.m. – 3:30 p.m ET



### Turning volatility into opportunity

**SPEAKER:** Dan Dupont, *Portfolio Manager*

**MODERATOR:** Pat Bolland

3:30 p.m. – 3:45 p.m. ET



### Day 1 closing remarks

David Bushnell, *Senior Vice President, Advisor National Sales*

3:45 p.m. – 3:50 p.m. ET



Virtual close

## CONFERENCE DAY 2

Friday, October 13, 2023

8:20 a.m. – 8:30 a.m. ET

**Welcome to our virtual attendees**

8:30 a.m. – 8:40 a.m. ET

**Day 2 opening remarks**

David Bushnell, *Senior Vice President, Advisor National Sales*

### SEGMENT 4

8:40 a.m. – 9:25 a.m. ET

**What's in store for emerging markets?**

**SPEAKER:** Sam Polyak, *Portfolio Manager*

**MODERATOR:** Kathryn Black

9:25 a.m. – 9:35 a.m. ET

**Exclusive virtual session**

Details to follow.

9:35 a.m. – 10:20 a.m. ET

**Uncovering hidden gems: Intrinsic value investing**

**SPEAKERS:** Morgen Peck, *Portfolio Manager*  
Sam Chamovitz, *Portfolio Manager*  
Salim Hart, *Portfolio Manager*

**MODERATOR:** Pat Bolland

10:20 a.m. – 10:30 a.m. ET

**Exclusive virtual session**

Details to follow.

## CONFERENCE DAY 2 *(continued)*

Friday, October 13, 2023

### SEGMENT 5

10:30 a.m. – 11:15 a.m. ET



#### The power and potential of contrarian investing

**SPEAKER:** Hugo Lavallée, *Portfolio Manager*

**MODERATOR:** Kathryn Black

11:15 a.m. – 11:40 a.m. ET



#### Regulatory update

**SPEAKER:** Sian Burgess, *Senior Vice President, Fund Oversight*

11:40 a.m. – 11:55 a.m. ET



#### Exclusive virtual session

Details to follow.

### SEGMENT 6

11:55 a.m. – 12:50 p.m. ET



#### The global macro view

**SPEAKER:** Jurrien Timmer, *Director, Global Macro*

12:50 p.m. – 1:00 p.m. ET



#### Summary and conference close

David Bushnell, *Senior Vice President, Advisor National Sales*

1:00 p.m. – 1:05 p.m. ET



#### Virtual close