



Canadian Bond
Investors' Association

Association canadienne des
investisseurs obligataires

ANNUAL GENERAL MEETING
and
FORUM: ALTERNATIVE DATA

Thursday, April 25, 2019 at 2:15 PM
Le Westin Montreal
270 Saint-Antoine St W, Montreal, QC

ANNUAL GENERAL MEETING and FORUM: ALTERNATIVE DATA

PROGRAM

1:45 – 2:15 PM	Registration
2:15 – 3:00 PM	Annual General Meeting
3:00 – 5:00 PM	Forum on Alternative Data
5:00 – 6:30 PM	Networking Reception

CBIA Annual General Meeting

2:15 – 3:00 PM

- 1) Call to Order – Ian McKinnon, Presiding
- 2) Confirmation of Notice of Meeting and Quorum
- 3) Adoption of Agenda
- 4) Approval of Minutes of the April 26, 2018 AGM
- 5) Financial Statements for the year ending December 31, 2018
- 6) Appointment of Auditors
- 7) Chair's Report
- 8) Nominations Report
- 9) Adjournment

CBIA Forum

3:00 – 5:00 PM

Alternative Data

Each year as part of CBIA's AGM we host an educational forum for the fixed income institutional investment community and invite dealers to attend. When it comes to investing, the name of the game is information. To outperform in an increasingly competitive market, global investment professionals have added Alternative data to their toolkit.

Please join us for an informative afternoon with presentations from some of the world leaders in the alternative data space. You will gain insight on how global investors now utilize alternative data as it's proven to be a leader, not laggard, time and time again. If you are looking to improve your investment strategy, you should be looking at Alternative Data.

3:00 – 3:30	Tom Gray, Vice President and Specialty Sales Manager, FactSet Canada
3:30 – 4:00	Ben Breitholtz, Chief Data Scientist, Arbor Research & Trading
4:00 – 4:30	Clayton Feick, Vice President, Global Head of Sales & Business Development Abraham Thomas, Chief Data Officer Quandl at Nasdaq
4:30 – 5:00	Richard Hockley, Head of Client Solutions, UBS Evidence Lab

Speakers



Benjamin Breitholtz
Chief Data Scientist
Arbor Research & Trading, LLC

Ben is well-known for his data-driven coverage of central bank policies, inflation and broad macroeconomic themes. He has run the gamut of analysis from producing algorithmic trading strategies to getting deep into the minds of consumers using the unstructured data of search trends and social media. Ben earned a Bachelors degree in Finance from the University of Wisconsin, Madison, and a Masters of Science in Predictive Analytics from Northwestern University. His comments and research are frequently used in corporate boardrooms and quoted by financial media. In addition, Ben is a main contributor to the Bianco Research, LLC, Newsclips research product.



Clayton Feick
Vice President, Global Head of Sales & Business Development
Quandl at Nasdaq

Since Nasdaq's acquisition of Quandl in December 2018, Clayton has led a team of Regional Managing Directors and Sales Directors in Toronto, New York & London driving sales and business development for Quandl. The team's focus is on sourcing and distributing unique, alpha-generating, alternative data for institutional clients. With over a decade of experience in capital markets, Clayton is an entrepreneurial results-oriented sales leader, who is passionate about the intersection between finance and technology.



Tom Gray
Vice President and Specialty Sales Manager
FactSet Canada's Content & Technology Solutions

Tom began his career in Wealth Strategy at UBS before joining FactSet. Through collaboration with his team, Tom oversees the creation, implementation, and support of standard and customized financial data delivery solutions for Asset Management clients across North America. Tom collaborates, with investment professionals, quant and technology specialists to improve data delivery methods, ensure superior data quality and timely delivery of our traditional and alternative datafeed products. Tom brings a wealth of experience on alternative data and non-traditional content sets. See the attached photo.



Richard Hockley
Head of Client Solutions
UBS Evidence Lab

Richard has worked in investment research for 18 years, with the past 4 years at UBS. He started his career at Morgan Stanley in London and transferred to New York in 2007 to help create and manage Morgan Stanley AlphaWise data product until 2014, creating new internal research products based on web, search and product data for internal analysts. In 2014, he joined UBS AG to build its new UBS Evidence Lab group as one of the first employees on the team. He initially focused on its alternative data platform, scaling UBS Evidence Lab to feature heavily within the global research product. In 2017, he transferred to head UBS Evidence Lab and was involved in designing the external client offering. In 2018, he moved into his current role, focusing on developing external client solutions for UBS Evidence Lab.



Abraham Thomas
Chief Data Officer
Quandl

Abraham is the co-founder and Chief Data Officer of Quandl, the world's leading platform for alternative data. At Quandl, Abraham oversees all aspects of the data pipeline: data identification, acquisition, evaluation, research & development, organization and distribution. Prior to co-founding Quandl, Abraham was a bond trader and senior portfolio manager at a multi-billion-dollar quantitative hedge fund.

CBIA Networking Reception

5:00 – 6:30 PM

A casual networking opportunity with CBIA members and other key industry leaders.

**Program subject to change*



**AGM AND FORUM
APRIL 25, 2019**

**REGISTRATION FORM
CBIA MEMBER FIRMS**

Registration is open to employees of CBIA member companies

FIRM NAME _____

MEMBER NAME _____

Please feel free to copy this form for other members from your company

Please submit to:

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Tel: 416-585-3000 Fax: 416-585-3005 Email: info@bondinvestors.ca