

DELIVERING ALPHA



**Institutional
Investor**

DELIVERING ALPHA

Wednesday • July 18, 2018

7:30–8:30 a.m.

REGISTRATION AND BREAKFAST

Breakfast sponsored by: Hospital for Special Surgery

8:30–8:45 a.m.

WELCOME REMARKS

Master of Ceremonies: Tyler Mathisen, Co-Author, “Power Lunch” and Vice President, Events Strategy, CNBC

- Diane E. Alfano, *Chairman and Chief Executive Officer, Institutional Investor*
- Mark Hoffman, *Chairman, CNBC*

8:45–9:15 a.m.

OPENING KEYNOTE

Lawrence A. Kudlow, Director, United States National Economic Council

Interviewer: Jim Cramer, Host, “Mad Money w/Jim Cramer” and Co-Author, “Squawk on the Street,” CNBC

9:15–9:45 a.m.

DELIVERING GLOBAL ALPHA

Panelists:

- Mary Callahan Erdoes, *Chief Executive Officer, J.P. Morgan Asset & Wealth Management*
- Marc Lasry, *Chairman, Chief Executive Officer and Co-Founder, Avenue Capital Group*
- Cyrus Taraporevala, *President and Chief Executive Officer, State Street Global Advisors*

Moderator: Michelle Caruso-Cabrera, Chief International Correspondent and Co-Author, “Power Lunch,” CNBC

9:45–10:15 a.m.

FORTIFYING CITADEL

Kenneth C. Griffin, Founder and Chief Executive Officer, Citadel

Interviewer: Andrew Ross Sorkin, Co-Author, “Squawk Box,” CNBC

10:15–10:45 a.m.

ALPHA UNDER THE RADAR

Edgar Wachenheim III, Founder, Chief Executive Officer and Chairman, Greenhaven Associates, Inc.

Interviewer: Jim Cramer, Host, “Mad Money w/Jim Cramer” and Co-Author, “Squawk on the Street,” CNBC

10:45–11:15 a.m.

COFFEE BREAK

11:15–11:45 a.m.

ALPHA SPOTLIGHT

Jonathan Gray, President and Chief Operating Officer, Blackstone

Interviewer: David Faber, Co-Author, “Squawk on the Street,” CNBC

- 11:45–12:15 p.m. **BEST IDEAS FOR ALPHA**
Panelists:
 - James Chanos, *Founder and Managing Partner, Kynikos Associates*
 - Alexander J. Roepers, *Founder and Chief Investment Officer, Atlantic Investment Management**Moderators:*
 - Melissa Lee, *Host, “Fast Money” and “Options Action,” CNBC*
 - Guy Adami, *CNBC Contributor and Director of Advisor Advocacy, Private Advisor Group*
- 12:15–2:15 p.m. **LUNCHEON**
Luncheon sponsored by: AARP
David M. Rubenstein, *Co-Founder and Co-Executive Chairman, The Carlyle Group*
Interviewer: Becky Quick, Co-Anchor, “Squawk Box” and Anchor, “On the Money,” CNBC
- 2:15–2:45 p.m. **RATES, RISKS, RETURNS**
Howard Marks, *Co-Chairman, Oaktree Capital*
Interviewer: Scott Wapner, Host, “Fast Money Halftime Report,” CNBC
- 2:45–3:15 p.m. **BEST IDEAS FOR ALPHA**
Panelists:
 - Alexander J. Denner, *Founding Partner and Chief Investment Officer, Sarissa Capital Management LLP*
 - Samantha Greenberg, *Chief Investment Officer, Margate Capital Management LP**Moderators:*
 - Melissa Lee, *Host, “Fast Money” and “Options Action,” CNBC*
 - Guy Adami, *CNBC Contributor and Director of Advisor Advocacy, Private Advisor Group*
- 3:15–3:45 p.m. **TALES FROM THE CRYPTO**
Panelists:
 - Jeremy Allaire, *Co-Founder and Chief Executive Officer, Circle*
 - Barry Silbert, *Founder and Chief Executive Officer, Digital Currency Group**Moderator: Melissa Lee, Host, “Fast Money” and “Options Action,” CNBC*
- 3:45–4:15 p.m. **COFFEE BREAK**
- 4:15–4:45 p.m. **ALPHA STRATEGY SESSION**
Panelists:
 - Suni Harford, *Head of Investments, UBS Asset Management*
 - Marc Levine, *Chairman, Illinois State Board of Investment*
 - Kristi Mitchem, *Chief Executive Officer and Head, Wells Fargo Asset Management*
 - David C. Villa, *Chairman and Chief Investment Officer, State of Wisconsin Investment Board**Moderator: Scott Wapner, Host, “Fast Money Halftime Report,” CNBC*
- 4:45–5:15 p.m. **MIDTERMS, CHINA AND TRUMP: A POLITICAL AND ECONOMIC PERSPECTIVE WITH STEVE BANNON**
Stephen K. Bannon, *Former White House Chief Strategist and Chief Executive Officer of Trump Campaign*
Interviewer: Michelle Caruso-Cabrera, Chief International Correspondent and Co-Anchor, “Power Lunch,” CNBC
- 5:15 p.m. **COCKTAIL RECEPTION**