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AGENDA

8:15 - 9:00 AM **Registration and Breakfast**

9:00 - 9:10 AM **Welcoming Remarks**

David Antin, *Chief Executive Officer*, NDR

9:10 - 10:00 AM **Economic Outlook**

Synchronized global growth has bolstered markets around the world. But how enduring are the forces underpinning this growth? Central banks shored up the markets with quantitative easing and massive purchases of securities, so what happens as they reverse course? How serious are the geopolitical threats everywhere from the Korean peninsula to the Middle East to Western Europe? Will protectionist impulses constrain global trade? This panel of economists will pinpoint the major issues and currents shaping the investment environment.

Moderator:

Harvey D. Shapiro, *Senior Advisor, Euromoney/Institutional Investor*

Panelists:

Patrick Chovanec, *Managing Director and Chief Strategist, Silvercrest Asset Management*

Veneta Dimitrova, *Senior U.S. Economist, NDR*

Megan Greene, *Managing Director and Chief Economist, Manulife Asset Management*

10:00 - 11:00 AM

Investment Strategy: What's the right way—and the wrong way—to master the current market?

The global economic expansion that has been unfolding is creating a number of investment opportunities—and risks. How should investors respond to current conditions and position themselves for inevitable course corrections? What are today's most attractive markets and securities, and what are the best ways for investors to access these opportunities? This panel will review precisely where investors should be placing their bets now—and a year from now.

Moderator:

Michael Santoli, *CNBC Senior Markets Commentator*

Panelists:

Ed Clissold, *Chief U.S. Strategist, NDR*

Tim Hayes, *Chief Global Investment Strategist, NDR*

Joe Kalish, *Chief Global Macro Strategist, NDR*

11:00 - 11:30 AM

Coffee Break

11:30 AM - 12:30 PM

Breakout Sessions

I. The Changing World of ETFs: New instruments, new strategies, new opportunities

II. Emerging Markets: Finding the right time and the right way

III. Energy and Automobiles
Energy and automobiles, two interrelated

Since the first exchange traded fund was offered 25 years ago, this marketplace has mushroomed and now offers some 7200 products with a value of \$4.8 trillion. ETFs offer a low cost tool offering individuals as well as institutions a range of sophisticated trading strategies, but they also are exerting a growing impact on the underlying markets. Now ETF providers are seeking to move beyond passive strategies to facilitate more active bets. Here's how to maximize the role that ETFs can play.

Deborah Fuhr,
*Managing Partner
& Co-founder,*
ETFGI

Will Geisdorf,
Strategist, NDR
Leighton Shantz,
Director of Fixed

For years economists and market commentators have said the future resides in the emerging markets: This is where the world's economic growth will be centered, and this is where major investment opportunities are being created. But the emerging markets continue to trace out a decidedly uncertain and erratic path, with one step forward and one step back in country after country. How can investors find the best opportunities in these markets? And how can they protect themselves against the seemingly inevitable shortfalls and reversals?

Hassan Malik,
*Senior International
Strategist, NDR*

industries at the heart of the U.S. economy, are both being thoroughly disrupted. Fracking, renewables, geopolitics, and the prospect of electric cars are disrupting energy. Meanwhile, electric –and autonomous– cars may well transform the auto industry. In ten years will the “big three” be General Motors, Ford, and Fiat-Chrysler—or Apple, Google, and Tesla? (Or perhaps Guangzhou, Brilliance, and Dongfeng Motor Corp.) Our panelists will examine where these two crucial industries are headed and suggest ways investors can capitalize on the new world of energy and automobiles.

*Income, Employees
Retirement System
of Texas*

Doron Levin,
*Former Detroit
correspondent for
the New York
Times, The Wall
Street Journal,
Bloomberg, and
Fortune | Host of
“In the Driver’s
Seat” on SiriusXM*
Warren Pies,
*Energy Strategist,
NDR*

12:30 - 2:00 PM

Lunch and fireside chat: Ned Davis and Byron Wien

These two well-known investment veterans will share their views on a wide range of issues shaping the investment environment. In addition to offering their analyses of the themes and trends that will drive financial markets in the months ahead. Byron Wien will review his celebrated “surprises,” and Ned Davis will offer his commentary as well.

Moderator:

Harvey D. Shapiro, *Senior Advisor, Euromoney/Institutional Investor*

Speakers:

Ned Davis, *Senior Investment Strategist, Founder, NDR*

Byron Wien, *Vice Chairman - Private Wealth Solutions Group, Blackstone*

2:00 - 3:00 PM

Breakout Sessions

**I. Fixed Income:
Are we in a bear
market for bonds?**

For more than
three decades,
historically low
interest rates

**II. Major
Demographic
Moves Ahead**

Each of the three
largest
generations in the
U.S. population are

**III. Picking Stocks
with NDR Tools**

An NDR
relationship
provides access to
a vast array of
analytical tools.

drove a bull market in bonds. But now there have been several increases in interest rates, with more to come. Meanwhile, the massive quantitative easing programs that gave markets an enormous tail wind are now winding down in the U.S. and Europe. What are the prospects for bond markets around the world? What's the outlook for such instruments as private credit and loans, that have been attracting investors." Speakers in this session will focus on where investors should focus their attention at what many regard as a historic turn in the fixed income markets?

Moderator:
Michael Santoli,
CNBC Senior

nearing major milestones: The Baby Boomers are reaching retirement age. Members of Gen-X are hitting their peak earning years. And the Millennials are entering their 30s and exerting a growing impact as consumers as well as employees. Each of these moves into new life stages brings major shifts in consumer spending patterns. This session will examine these shifts, and indicate how investors can profit from them.

Pat Tschosik, U.S.
Sector Strategist,
NDR

Here's how to use them most effectively.

Brian Sanborn,
Director of Research Applications, NDR

*Markets
Commentator*

Panelists:

Dan Fuss, *Vice
Chairman and
Portfolio Manager,
Loomis, Sayles &
Company*

Joe Kalish, *Chief
Global Macro
Strategist, NDR*

3:00 - 3:45 PM

The Leading—and Misleading—Indicators

Zachary Karabell, *Head of Global Strategies, Senior Consultant,
Envestnet, Inc. | President, River Twice Research*

3:45 - 4:10 PM

Coffee Break

4:10 - 5:00 PM

What's the Right Path? Contending Approaches to Portfolio Construction

There is a growing array of broad-gauged portfolio construction strategies for investors to choose among. Once the debate was all about growth vs value, active vs. passive, and fundamental vs. technical analysis. Now there's systematic investing, factor-based investing, smart beta, risk budgeting, and a number of other ideas about how to organize a portfolio. Some ideas, from portfolio insurance to portable alpha, seem to come and go, but others endure. What ideas represent advances in portfolio theory, and what's just old wine in new bottles?

Jeffrey Knight, *Global Head of Investment Solutions and Co-head of Global Asset Allocation, Columbia Threadneedle Investments*
Tim Hayes, *Chief Global Investment Strategist, NDR*

5:00 - 5:45 PM

Exploring New Ways of Thinking about the Future[s]

Futurist Thornton May studies the ways businesses, governments and individuals think [and sometimes don't think]

about the future. How we think about the future impacts how we act. And how we act drives markets. In this entertaining and informative interactive session, we will examine cognitive techniques [some historical, some emergent] that provide savvy investors with the insights needed to respond effectively to what comes after what comes next. While Ned David Research is a pioneer in sentiment/behavioral market analyses, Thornton will uncover behavioral aspects of the markets that even NDR hasn't thought about. He contends that much about the future is knowable—if you ask the right questions to the right people and rigorously interrogate the mental models at work in the economy today.

Thornton May, Futurist & Author

5:45 PM

Closing Remarks

5:45 - 7:00 PM

Cocktail Reception

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