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COORDINATED BY



# 13<sup>TH</sup> ANNUAL GLOBAL ETF AWARDS®



"How the industry measures excellence."

## WORKSHOP BROCHURE

Convene at 237 Park Avenue

New York City

April 20, 2017

### COMPLIMENTARY WIFI ACCESS:

Network: Convene Conference Centers

Password: meetings

Dear Delegate;

On behalf of [exchangetradedfunds.com](http://exchangetradedfunds.com) I would like to welcome you to the 13th Annual ETF Global ETF Workshop.

The workshop forums are designed to educate industry participants and professionals in innovative and progressive trends in the global ETP industry. Our distinguished speaker faculty consists of industry experts from the domestic and international ETP marketplace. Thanks to this collaboration, it allows us to present timely and informative discussions that the delegates can benefit from.

We highly encourage audience participation and hope that you will find benefit from the ideas and information throughout the afternoon.

Your feedback is important to us. Please take a few moments to complete the evaluation form and return it to our staff before leaving. If you have any questions, our staff will be on hand throughout the event to assist you.

We thank you for your participation and hope you will leave these sessions with new ideas and new contacts.

Sincerely,

**Exchangetradedfunds.com**

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## SCHEDULE OF EVENTS

3:30 PM

### REGISTRATION

4:00 - 6:00PM

### GENERAL DISCUSSION FORUM

4:00 PM

#### Time to have the conversation

Actively-Managed & Smart Beta ETFs: Risks And Benefits

#### Moderator:

**Julie Abbett**, Executive Director, J.P. MORGAN

#### Panelists:

**Mike Castino**, Senior Vice President, U.S. BANCORP FUND SERVICES, LLC

**Dodd Kittsley**, Director ETF Strategy, DAVIS ADVISORS

**Michael Krause**, President, ALTAVISTA RESEARCH

**Scott Szever**, Director of Exchange Traded Products, NEW YORK STOCK EXCHANGE

**Mike Venuto**, CIO, TOROSO INVESTMENTS

5:00 PM

#### The Global ETP Market Place evolution-how will the market grow?

What changes are occurring in the ETP marketplace-how is regulation, technology and market conditions impacting product development and growth?

#### Moderator:

**Andrew Pfeifer**, Senior Relationship Executive, BNY MELLON

#### Panelists:

**Samuel Masucci**, CEO & Founder, ETF MANAGERS GROUP

**Rod Jones**, Head of Sales North America, Managing Director, STOXX

**Rory Riggs**, CEO, SYNTAX LLC

**Bibb Strench**, Partner, THOMPSON HINE

**Coen van Sevenhoven**, Managing Director & Head of Trading, FLOW TRADERS US LLC

## GLOBAL ETF AWARDS CELEBRATION AND DINNER

6:00 PM Opening Cocktail Reception

7:00 PM Global ETF Awards® Dinner

## speakers



### Julie Abbett

JP Morgan  
Executive Director



### Mike Castino

U.S. Bancorp Fund Services, LLC  
Senior Vice President



### Rod Jones

STOXX  
Head of Sales, North America,  
Managing Director



### Dodd Kittsley

Davis Advisors  
Director ETF Strategy



### Michael Krause

AltaVista Research  
President



### Samuel Masucci

ETF Managers Group  
CEO & Founder



### Andrew Pfeifer

BNY Mellon  
Relationship Executive



### Rory Riggs

Syntax LLC  
CEO



### Coen van Sevenhoven

Flow Traders US LLC  
Managing Director & Head  
of Trading



### Bibb Strench

THOMPSON HINE  
Partner



### Michael Venuto

Toroso Investment  
Chief Investment Officer



### Scott Szever

New York Stock Exchange  
Director of Exchange Traded  
Products

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**Syntax** Syntax is a leading innovator in financial technology and the creator of Syntax Stratified Indices, a major advancement in portfolio diversification. Based in New York, the company has built a family of over 40 Syntax Stratified Indices that cover different risk categories and geographies such as the US, Europe and Asia and thematic universes, like socially responsible investments, real assets, and infrastructure. Syntax has agreements with several major index providers, including S&P Dow Jones Indices, to provide stratified-weight versions of the world's largest passive index benchmarks. By taking the same constituent companies as used by the most popular indices and only changing the index weights, Syntax Stratified Indices offer alternative benchmarks which are less susceptible to the negative impacts of overweighting in related business risks without sacrificing performance in normal markets.

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