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Search Session

40 Sessions

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All Days Mon Apr 20 Tue Apr 21 Wed Apr 22

All Sessions (40) My Interests

Mon Apr 20

9:00 AM

9:00 AM - 11:00 AM PDT (2 Hours)

Pre-event Padel Up experience

Kick off The Annual in LA with our pre-event Padel Up experience. This session begins with a one-hour introductory padel lesson led by expert coaches, followed by open play and friendly

12:00 PM

12:00 PM - 12:35 PM PDT (35 Min)

Registration, welcome lunch & networking

12:35 PM

12:35 PM - 12:40 PM PDT (5 Min)

Welcome remarks

12:40 PM

P&F 2.18.26

12:

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Is US exceptionalism over? Rethinking global leadership in markets and capital

This session examines whether the US's dominance - economically, geopolitically, and in financial markets - is entering a new phase. For institutional allocators, the implications are


(https://events.withintelligence.com/the

en(https://events.withintelligence.com/the speakers/3802039)

(40)

1:20 PM

1:20 PM - 2:00 PM PDT (40 Min)

Separating giants: Investing in a world where China and the US diverge

The US and China are diverging economically, technologically and politically, creating new challenges (and opportunities) for institutional investors. Portfolio construction and


(https://events.withintelligence.com/the

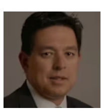
en(https://events.withintelligence.com/the speakers/3848269)

2:00 PM

2:00 PM - 2:40 PM PDT (40 Min)

Liquidity engineering: How investors & fund managers are solving the distribution drought

As traditional exits remain sluggish, investors are turning to creative liquidity solutions. From the rise of fund manager-led secondaries and NAV loans to increased use of public market


(https://events.withintelligence.com/the

en(https://events.withintelligence.com/the speakers/3863716)

2:40 PM

2:4 Join us (https://events.withintelligence.com/theannual/page/5282346/join-us)

Headline presentation

- Presentation from T. Rowe Price -

Sponsored By:

T.RowePrice

(40)

3:00 PM

3:00 PM - 3:30 PM PDT (30 Min)

Refreshment break

3:30 PM

3:30 PM - 4:10 PM PDT (40 Min)

Separating alpha from beta: Where institutional investors are really getting paid

Institutional investors are asking tougher questions than ever: Where is true alpha being generated, and where are we paying fees for beta exposure? With multi-asset portfolios

(https://events.withintelligence.com/the

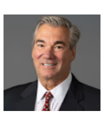
en(https://events.withintelligence.com/the speakers/3802062)

4:10 PM

4:10 PM - 5:00 PM PDT (50 Min)

Specialist strategy showcase

With 15 minutes each on the clock, three managers will discuss the market drivers that guide their investment strategies, spotlighting public and private investment opportunities. The



(https://events.withintelligence.com/the

en(https://events.withintelligence.com/the speakers/3841274)

5:00 PM

5:(

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Cocktail reception

Tue Apr 21

8:15 AM

(40)

8:15 AM - 8:55 AM PDT
(40 Min)

Breakfast - investor-only exchange

8:15 AM - 8:5
(40 Min)

Breakfast

8:55 AM

8:55 AM - 9:15 AM PDT (20 Min)

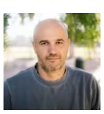
Welcome remarks & With Intelligence market insights

9:15 AM

9:15 AM - 9:45 AM PDT (30 Min)

Fireside chat with Stephen Witt

Mr. Witt is a Los Angeles-based author, television producer, and investigative journalist. He frequently writes for The New Yorker magazine, and his latest book “The Thinking Machine, the



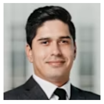
Stephen Witt (https://events.withintelligence.com/theannual/agenda/speakers/3855318)
Los Angeles-Ba...
Keynote

9:45 AM

9:4 Join us (https://events.withintelligence.com/theannual/page/5282346/join-us)

Are we living in a valuation bubble or a new dawn?

Public equity markets remain near record highs, private market marks are slow to reset, and risk assets are thriving despite higher rates and mounting fiscal pressures. Are we witnessing a

 (https://events.withintelligence.com/the  en(https://speakers/3855011)ligence.com/the

(40)

10:25 AM

10:25 AM - 11:05 AM PDT (40 Min)

When machines become CIOs: Are humans the weak link in portfolio construction?

The promise is enormous: cleaner signals, faster optimization, continuous risk recalibration, and the scaling of investment judgment beyond human limits. But the risks are equally profound. AI

11:05 AM

11:05 AM - 11:35 AM PDT (30 Min)

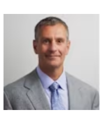
Refreshment break

11:35 AM

11:35 AM - 11:55 AM PDT (20 Min)

Headline presentation

- Presentation from Principal Investments -



Mr. George Maris (https://events.withintelligence.com/theannual/agenda/speakers/3878923)
Chief Investme...
Principal Asset ...
Speaker

Sponsored By:

Principal Asset Management®

11:55 AM

11:

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Hedge funds: Diversifier, defender or dead weight?

After years of mixed performance and fee compression, hedge funds are regaining attention from institutional investors; not as high-octane return engines, but as strategic tools for

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(https://events.withintelligence.com/theannual/agenda/speakers/3802082)

(40)

12:35 PM

12:35 PM - 1:15 PM PDT (40 Min)

Bonds are back - but not as we knew them

After a decade of near-zero yields, fixed income has re-emerged as a true return source — but also as a complex strategic decision. With rates structurally higher, inflation sticky, and global

1:15 PM

1:15 PM - 2:15 PM PDT (1 Hour)

Lunch

2:15 PM

2:15 PM - 2:55 PM PDT
(40 Min)

Breakout 1A: Boards, biases & best practice: Evolving governance across ...

Effective governance is critical for institutional investors, but approaches differ widely between pension funds, endowments, and family offices. Pension funds often operate with formal committees,

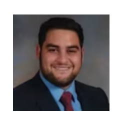
Read More (https://events.withintelligence.com/theannual/agenda/session/1755825)

Brendan MacMillan (https://events.withintelligence.com/theannual/agenda/speakers/3841816)
Chief Investme...
QP Global
Speaker

2:15 PM - 2:5
(40 Min)

Breakout

Real assets r
emerging tec
Read More (ht



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Breakout 2A: Unlocking real value in asset-based finance

The retrenchment of US regional banks from certain lending activities has increased investor attention on asset-based finance (ABF). From infrastructure and equipment leasing to trade receivables, real

Read More (https://events.withintelligence.com/theannual/agenda/session/1755827)

Clay Burns (https://events.withintelligence.com/theannual/agenda/speakers/3878913)
Managing Dire... (40)
Nuveen
Speaker

3:00 PM - 3:
(40 Min)

Breakout

Crypto and di
are exploring
Read More (ht

3:40 PM

3:40 PM - 4:10 PM PDT (30 Min)

Refreshment break

4:10 PM

4:10 PM - 4:30 PM PDT (20 Min)

Headline presentation

- Presentation from BlackRock -

Sponsored By:

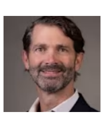
BlackRock

4:30 PM

4:30 PM - 5:10 PM PDT (40 Min)

From core to digital & decarbonized: Infrastructure's next chapter

As infrastructure evolves from traditional 'core' assets like utilities and roads, to the fast-growing domains of digital infrastructure and decarbonized energy systems, institutional



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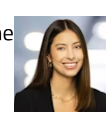

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5:10

Join us (https://events.withintelligence.com/theannual/page/5282346/join-us)

5:10 PM - 5:40 PM PDT (30 Min)

CIO fireside chat

5:40 PM (40)

5:40 PM - 7:00 PM PDT (1 Hour, 20 Min)

Cocktail reception

Wed Apr 22

9:00 AM

9:00 AM - 9:10 AM PDT (10 Min)

Welcome remarks

9:10 AM

9:10 AM - 9:50 AM PDT (40 Min)

If 60/40 is broken, what comes next?

Rising rates, fiscal dominance, and persistent inflation have challenged the foundational assumptions of institutional portfolio construction. Correlations between stocks and bonds

 (https://events.withintelligence.com/the  enda/speakers/3845326) (https://events.withintelligence.com/the

9:50 AM

9:5

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The quant invasion: How systematic strategies are reshaping traditional portfolios

Quantitative and systematic strategies are no longer niche: they're now integrated across public equities, fixed income, alternatives, and even private markets. This panel explores

Karishma Kaul (https://events.withintelligence.com/theannual/agenda/speakers/3880827)
CIO, Systemati...
Fidelity Instituti...
Speaker

(40)

10:30 AM

10:30 AM - 10:50 AM PDT (20 Min)

Headline presentation

- Presentation from Orbis -

Sponsored By:

10:50 AM

10:50 AM - 11:20 AM PDT (30 Min)

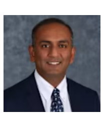
Refreshment break

11:20 AM

11:20 AM - 12:00 PM PDT (40 Min)

Rethinking emerging markets: Structural opportunity or perpetual value trap?

Emerging markets are at an inflection point. After years of underperformance relative to developed markets, shifting global dynamics - from supply chain realignment and onshoring to



Amit Thanki (https://events.withintelligence.com/theannual/agenda/speakers/3857037)
Senior Investm...
San Bernardino...
Speaker

12:00 PM

12:

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Closing CIO panel: 20 years of change, 20 years ahead – the next era of institutional investing

This session will bring together senior allocators to reflect on the past 20 years since the launch of The Annual, and look forward to what is to come. Panellists will take stock of two


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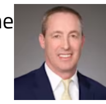
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12:45 PM

12:45 PM - 12:50 PM PDT (5 Min)

Closing Remarks

12:50 PM

12:50 PM - 2:00 PM PDT (1 Hour, 10 Min)

Closing Lunch