

2015 Summit: Challenging Markets

How to prepare your portfolio

Opening Ceremony



Irving Fire Department Color Guard

Kick-Off Presentation



Ralph Divino, Senior Fixed Income Client Portfolio Manager
Voya Investment Management

Finding Opportunities in a Challenging Fixed Income World

Ralph will provide a quick overview of the macro environment and headwinds facing fixed income investors today. He will also review areas of non-traditional fixed income investment opportunities and potential investment approaches to best capitalize on them.

Luncheon Presentation



Robin Wehbé, Global Natural Resource PM
The Boston Company Asset Management, LLC

Revolution in Energy

Technology is essential to the global economy, allowing companies to do more with less. In the Energy sector, technology has catalyzed a massive paradigm shift, resulting in productivity gains across the industry and around the world. Exploration & production companies (E&Ps) have frequently been viewed as a way to reap the benefit of the cash flow between the firms' costs and a rising commodity price. The shift in supply have changed that entire dynamic and companies will be unable to grow simply from higher commodity prices, causing intense competition, leaving growth as the only other way to create value.



2015 Summit – Features



Panel Discussions

Topics address current issues such as currency, rates, and alternatives
Uncover ways to manage your portfolio to meet current market challenges

Fixed Income Trends

Fixed Income Investing in a Dynamic Global Market: exploring trends in unconstrained fixed income, emerging markets debt, liquidity, and other issues.

Breakout Sessions

Breakout Sessions will address issues that are specific to each investor group. This smaller setting is ideal for discussing the issues that are common for all in the group and that many are dealing with.

1. **Defined Contribution Plans:** *DC plans - The shift from DB to DC plans, income sufficiency, and white labeling trends.*
2. **Defined Benefit Plans:** *DB plans - LDI for public plans, LDI completion, annuitize liabilities, investment policy, governance, and fiduciary issues.*
3. **SRI – Socially Responsible Investing:** *SRI, ESG, and Impact Investing – what do they mean for your portfolio in terms of legal concerns, IRR, risks and values.*

Equity Trends

Equity trends - Discussing and evaluating sector allocations, global and international trends, active vs. passive and other issues.

Real Assets

Real Assets - Can real assets increase returns and add stability to the portfolio at the same time? What role should real assets play?

ETF's – Exchange Traded Funds

Uses of ETFs within Institutional Portfolios - How ETF's are being used to manage transitions, access various asset classes, and improve efficiencies.

Hedge Funds

Hedge Funds - Should they be used as a fixed income substitute during rising interest rates?

