Hindsight is 2020: The Year in Review and What Lies Ahead

PMAC National Conference
Tuesday, November 17th

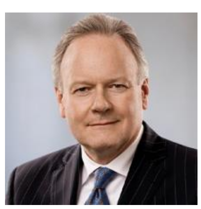
12:30 PM ET | **Welcome & Opening Remarks**


Zachary Curry, President & Portfolio Manager, Davis-Rea Ltd. & PMAC Conference Committee Chair
Katie Walmsley, President, Portfolio Management Association of Canada

12:40 PM - 1:35 PM ET | **Early Post-Pandemic Considerations for Financial Markets with Stephen Poloz, former Governor of the Bank of Canada**

We are six months into a new economic reality with high unemployment globally, new directions in monetary policy, an upcoming hotly contested US presidential election, and social discord. Making decisions on investment strategy is challenging while global inflation rates, international trade restriction and volatile financial markets are our new reality.

Stephen Poloz will provide some brief comments on the potential challenges and opportunities ahead and engage in a lively Q&A with **Lesley Marks**, Chief Investment Officer & Head of Investment Management, BMO Private Wealth Canada.




Thank you to our Diamond Sponsor:

NATIONAL BANK
INDEPENDENT NETWORK

1:35 PM – 1:45 PM ET | **Break & Exhibit Viewing**

1:45 PM – 2:40 PM ET	**Market Outlook with David Rosenberg**

David Rosenberg, Chief Economist and Strategist, Rosenberg Research & Associates, best known for his bearish calls and as the author of "Breakfast with Dave", will provide his distillation of economic and financial market insights and forecasts. Based on his decades of experience in identifying shifts in the global economic cycle and assessing how such shifts influence the investment landscape, David's outlook will be eagerly anticipated.

Thank you to our **Platinum** Sponsor:

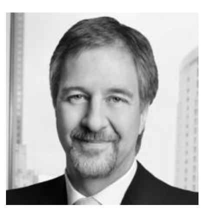
INFINITE INVESTMENT SYSTEMS

2:40 – 2:50 PM ET	**Break & Exhibit Viewing**

2:50 PM – 3:40 PM ET	**60/40 - Is the 40 Dead – What are options to the balanced portfolio and opportunities for alternatives**

With bond yields in North America once again reaching for zero and European yields holding their ground in negative territory, is the balanced portfolio still feasible? Are there now opportunities for utilizing alternatives to achieve an optimal risk and return profile? This expert panel will discuss the diversification considerations and why portfolios should go beyond the traditional 60/40 asset allocation.

- Moderator: **Tom Bradley**, Chair, Chief Investment Officer and Co-Founder, Steadyhand Investment Funds
- Panelists:
  - **David Picton**, President, CEO, PM CAD Equities, Picton Mahoney Asset Management
  - **Paul Sabourin**, Chairman & Chief Investment Officer, Polar Asset Management
  - **Jane Segal**, Portfolio Manager, Healthcare of Ontario Pension Plan (HOOPP)

Thank you to our **Platinum** Sponsor:

RBC Investor & Treasury Services

3:40 – 3:50 PM ET	**Break & Exhibit Viewing**

3:50 – 4:45 PM ET	**Geopolitical Predictions – Charles Myers**

Charles Myers, Founder and Chairman of Signum Global has over 20 years of US political and electoral experience advising candidates in Presidential, Senate, House of Representatives, Gubernatorial and Mayoral races, including Hillary Clinton for President 2016 and Joe Biden for President 2020.

Charles will discuss his predictions on the geopolitical environment and risks facing asset managers, post US 2020 election! His area of expertise include US foreign policy and the implications of the Trump presidency in the US, Europe and Asia. Charles also forecasts global trade policy, energy dynamics and regulation within the financial, energy and technology sectors in the US, UK and Europe.

4:45 PM ET	Concluding Remarks