

REBOOTING & REBUILDING

A Path Forward >



Advancing Standards™

**PMAC
National Conference**
Thursday,
November 18, 2021

Diamond Sponsor Lounge – Meet and Greet with NBIN

12:00 PM - 12:30 PM ET

Welcome & Opening Remarks

Zachary Curry, President
& Portfolio Manager, Davis-Rea Ltd.

Katie Walmsley, President,
Portfolio Management Association
of Canada

12:30 PM ET



Zachary Curry



Katie Walmsley

Opening Keynote – What the Future Holds for Canada & US Relations with the Middle East

Dr. Bessma Momani will discuss the rapidly changing international economic climate and comment on pressing geopolitical issues. Dr. Momani will speak to Middle Eastern and other international affairs, diversity and inclusion, and the state of the global economy.

A regular contributor to national and international media on global security and economic policy issues. Dr. Momani has written editorials for the New York Times, The Economist, The Globe and Mail, Newsweek, and Time Magazine.

Dr. Bessma Momani, Interim Associate Vice-President, Interdisciplinary Research Full Professor, Department of Political Science, University of Waterloo

12:45 PM - 1:30 PM ET



Dr. Bessma Momani

Break and Sponsor Booth Viewings

1:30 PM – 1:45 PM ET

Market Outlook for 2021 and Beyond

Will the Fed taper? Is inflation truly transitory? What should we make of the tightening employment market? Listen to these two industry titans, who will

provide their analysis of the Canadian and US Markets and their data-driven insights on positioning portfolios for the near future.

Lori Calvasina, Managing Director,
Head of US Equity Strategy,
RBC Capital Markets

Stéfane Marion, Chief Economist and
Strategist, National Bank of Canada

1:45 PM – 2:45 PM ET



Lori Calvasina



Stéfane Marion

Break and Sponsor Booth Viewings

2:45 – 3:00 PM ET

Are you confident in your ESG investing framework?

3:00 PM – 4:00 PM ET

Gone are the days where ESG strategies were simply negative screens used to eliminate tobacco and fossil fuel companies from the investment universe. Today investors demand complex, focused strategies that not only remove the negative, but invest in solutions to issues they hold dear.

Listen to respected ESG investors from industry leading firms about the evolution of their strategies for investing in the Sustainability and Governance aspects of ESG and the operational issues they have encountered in the process.

Moderator:

Gerald Butts, Vice Chairman & Senior Advisor at Eurasia Group; Former Principal Secretary to the Prime Minister of Canada

Panelists:

- Jessica Huang, Director, Head of Sustainable Investment Solutions for Americas, BlackRock
- Craig Noble, Managing Director, CEO Alternative Investments, Brookfield Asset Management



Gerald Butts



Jessica Huang



Craig Noble

Break and Sponsor Booth Viewings

4:00 – 4:15 PM ET

Closing Keynote – Through the Lens of Compassion

4:15 – 5:00 PM ET

Thupten Jinpa, Ph.D, English Translator to the Dalai Lama and Adjunct Professor of Religious Studies at McGill University, is internationally recognized as a global thought leader on mindfulness and compassion. Jinpa will explore how powerful compassion can be, not just

for others, but for our own wellbeing. He will share some personal stories from his career, lessons learned from travelling the globe with his holiness the Dalai Lama, and his perspective on the transformations that can result from the practice of compassion.



Thupten Jinpa Langri



Lorne Steinberg

Moderator: Lorne Steinberg, President, Steinberg Wealth Management



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