

Macro Summit Agenda

NASDAQ Headquarters | 151 W. 43 Street - 10th Floor | New York City

October 20, 2025		
8:15 am – 8:45 am	Breakfast / Check-In Registration	[10th Floor - Lobby]
8:45 am - 9:00 am	Welcome Remarks	• John Davi, Astoria Advisors • Sponsor Highlight
9:00 am – 9:45 am	Macro Outlook	• Jim Bianco, Bianco Research • Neil Dutta, Renaissance Macro Research
9:45 am - 10:30 am	Bond Outlook	• Jeffrey Sherman, CFA, DoubleLine Capital
10:30 am – 10:45 am	Refreshment Break	
10:45 am – 11:25 am	Fixed Income Portfolio Construction	• Neil Azous, Rareview Capital • Bryan Novak, Astor Investment • Nancy Davis, Quadratic Capital
11:25 am – 12:00 pm	Boosting Returns with Derivatives: Income Strategies for Modern Portfolios	• Jeff Chang, Vest • Garrett Paoletta, NEOS Investments • Will Rhind, GraniteShares
12:00 pm – 12:30 pm	Networking Lunch Break	[NASDAQ Headquarters]
12:35 pm – 1:10 pm	Smart Leverage: Strategies for Enhancing Portfolio Efficiency	• Shana Sissel, Banrion Capital Management • Corey Hoffstein, Newfound Research
1:10 pm – 1:45 pm	Are Passive Flows Distorting Markets?	• Mike Green, Simplify Asset Management • Dave Abner, Northern Trust
1:45 pm - 2:00 pm	Refreshment Break	
2:00 pm – 2:45 pm	Fireside Chat	• Dr. David Kelly, CFA, J.P. Morgan
2:45 pm – 3:30 pm	Beyond Stocks & Bonds: Allocating to Bitcoin and Real Assets	• Jon Maier, J.P. Morgan • Teddy Fusaro, Bitwise Asset Management • Paul Baiocchi, SS&C ALPS Advisors
3:30 pm – 4:15 pm	Asset Allocation Discussion with State Street	• Michael Arone, CFA, State Street
4:15 pm - 4:30 pm	Closing Remarks	• Sponsor Highlight

**Agenda is not final and is subject to change*