

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
9:00 am – 9:45 am	Macro Outlook	- Mary Ann Bartels, Sanctuary Wealth - 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, Beacon Capital - Nancy Davis, Quadratic Capital - Alexander Morris, F/m Investments, LLC
11:25 am – 12:00 pm	Boosting Returns with Derivatives: Income Strategies for Modern Portfolios	- Thomas Smykowski, BTIG - Jeff Chang, Vest - Wes Mathews, 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 - Christopher Ward, Bridgewater
1:10 pm – 1:45 pm	Are Passive Flows Distorting Markets?	- James Seyffart, CFA, CAIA, Bloomberg - Mike Green, Simplify Asset Management - Dave Abner, Northern Trust
1:45 pm - 2:00 pm	Refreshment Break	
2:00 pm – 2:45 pm	JP Morgan: Near Term Views, Long Term Vision	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 - Jeremy Schwartz, CFA, WisdomTree
3:30 pm – 4:15 pm	Asset Allocation Discussion with State Street	- Dan Skelly, Morgan Stanley - Michael Arone, CFA, State Street Investment Management
4:15 pm - 4:30 pm	Closing Remarks	Bob Pisani

*Agenda is not final and is subject to change