

INSTITUTIONAL ROUNDTABLE

SEPTEMBER 17 | NEW YORK

8:30 AM — **Registration & Continental Breakfast**

9:00 AM — **Welcome, Opening Remarks & Introductions**
Kimber Lintz | Executive Director | *IMEA*
Krista Barry | Enterprise Director | *Nasdaq eVestment*

9:30 AM — **Institutional Trends & Unlocking Actionable Insights**
This discussion will explore the latest institutional investment trends, investor allocations, research activity and fundraising opportunities while discovering how asset managers are leveraging advanced data analytics to unlock new value and competitive advantages.
Russ Elliott | Head of Asset Management Market Intelligence | *Nasdaq eVestment*

10:15 AM — **Executive Roundtable Discussions**
These candid, interactive conversations will provide a unique forum for leaders in institutional investments to take deep dives into top-of-mind issues in critical business area.

Institutional Market Data—Sources, Challenges & Best Practices
Explore how leading asset managers leverage institutional market data to analyze competitive positioning, identify business opportunities, and support product strategy. Learn best practices for sourcing, validating, and interpreting institutional data while overcoming common challenges related to data quality, classification, and peer group construction.
Discussion Leader:
Kurt Stam | Managing Director, Head of Institutional Public Productl | *Nuveen*

11:00 AM — **Break**

11:15 AM — **Scaling Private Markets Without Diluting the Value Proposition**
How institutionalization is changing what we build, how we package it, and who ultimately owns it.
The tension is interesting: private markets historically revolved around bespoke partnerships, closed-end funds, long lockups, concentrated manager relationships, and relatively limited liquidity. Now the industry is moving toward evergreen structures, semi-liquid vehicles, model portfolios, rated structures, strategic seed arrangements, wealth distribution, and increasingly standardized access. What is the impact of these changes?
Discussion Leader:
Lauren Ferry | Global Head of Alternatives Product Management & Product Specialists | *Lord Abbett*

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12:00 PM	**Networking & Box Lunch**
12:45 PM	**From Products to Solutions: Balancing Customization, Scale, and Growth** Despite consistent revenue growth, most asset managers have struggled to deliver operating leverage. How should managers think about meeting growing client demand for tailored solutions? What is the next major evolution for solutions? What are considerations for customization vs. scale, manufacturing vs. distribution, and ownership of the solutions agenda? This session explores navigating the challenges of delivering solutions while sustaining growth. Discover strategies to meet client needs while pursuing a purposeful balance of customization, scale, and growth. ***Discussion Leader:*** **Kevin Cho** | Global Head of Product | *Neuberger*
1:30 PM	**Winning in a Changing Consultant Landscape:** **How Investment Managers Can Build Stronger Consultant Partnerships** Discuss how the consultant landscape is evolving and explore strategies for strengthening engagement, deepening partnerships, and identifying emerging opportunities and risks. ***Discussion Leader:*** **Nikki Noriega** | Senior Client Portfolio Manager | *Invesco*
2:15 PM	**Open Discussion**
3:00 PM	**Adjourn**

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