

Humanity's most disruptive technology

Issues, Challenges, Opportunities for the Global Financial Community

**NOVEMBER** 

2 & 3, 2021

\*9:30 A.M. TO 12:30 P.M.

\* Montreal Time (EDT)

fiamtl.com

FIAM's FIRST INTERNATIONAL

AI IN CAPITAL MARKETS

CONFERENCE

(VIRTUAL FORMAT)



Organized by FIAM in collaboration with Financial Professional Associations



#### **ABOUT FIAM**

FIAM, a non-profit organization, is a collaborative platform, whose vision is to develop, over time, an international HUB, a global pole of excellence dedicated to research and applications of **AI/ML** technologies in Finance /asset management. This initiative complements Montreal **AI** ecosystem, internationally recognized for its significant contribution to **AI** especially in the areas of language modeling, machine translation, object recognition and generative models.

FIAM's main pillars are 1) the organization of an annual international conference on the generic theme of Disruptive Technologies in Finance/asset management. 2) the creation of a Lab dedicated to the development of applications/solutions in Finance, initially focussed on asset management. The Lab, "Financial Innovation & Risk Management Labs" was launched in August 2021 with the participation of 4 large assets management institutions.

FIAM sees its initiative as a community project, leveraging, when possible, on existing associations and /or organizations' mandates, and network.

While FIAM is based in Montreal, its outreach is global, as hence the importance of cultivating/building overtime an international network of relationships with leading organisations, researchers, institutes, selected service providers. To deliver relevant outcomes, FIAM must keep abreast of the evolving global AI landscape pertaining to Finance/asset management and develop its capabilities accordingly.

# Al Humanity's most disruptive technology

Issues, Challenges, Opportunities for the Global Financial Community

FIAM is honored to hold its first international conference in close partnerships with two outstanding conference co-chairs: Pierre Boivin, CEO of Claridge and Chairman of Mila and William (Bill) J. Kelly CEO of CAIA Association. Pierre was a driving force behind positioning Montreal as a thriving artificial intelligence ecosystem on the global scene.

The conference spans over two days – three hours each day.

Presentations are recorded and will be made available for replay on FIAM website and the websites collaborating organizations.

DAY-1 focus on the big picture; more strategic in content, highlighting the broad issues, challenges & opportunities brought by the accelerated deployment of **AI** globally.

DAY-2 is directed to institutional asset managers. The field of machine learning in finance is evolving constantly. As technology continues to progress and computing power increases, new use case are being identified and new applications are being developed. Presentations will therefore cover the current landscape and the challenges/pitfalls in applying machine learning to asset management and its deployment at scale.

Virtual format this year.



## November 2<sup>nd</sup>

DAY-1, focus on the big picture; more strategic in content, highlighting the broad issues, challenges & opportunities brought by the accelerating deployment of AI globally.

9:30
Opening the conference
Word of welcome from Claude Perron,
Founder of FIAM



Claude Perron Founder of FIAM Chairman Emeritus at Crystalline Management

9:35
Words from Pierre Boivin
and William J. Kelly,
Co-presidents of the event



**Pierre Boivin** CEO, Claridge Inc. Chairman of MILA



William J. Kelly President & CEO, CAIA Association

9:45 Nicolaus Henke's presentation



Nicolaus Henke Senior Partner Emeritus of McKinsey & Company

Over the past ten years, Al has evolved from little more than a boardroom buzzword into one of humanity's most influential technologies, guiding decisions in government, corporate leadership and throughout our daily lives. How should firms navigate the artificial intelligence era? And what shape will this technology take the coming years as businesses seek to leverage competitive advantage by scaling Al in the enterprise?

10:10 5 min. Pause

10:15
Manoj Saxena's presentation



Manoj Saxena Chairman Cognitive Scale & Responsible Al Institute

Confidence and trust in AI is a prerequisite to it's widescale adoption and impact. Current adoption of AI in the enterprise is getting stalled due to risk, and compliance concerns around black-box models and poor data quality. Trusted and Ethical AI is a prerequisite to drive growth in AI driven financial services while effectively managing AI business risks.

10:40
Yoshua Bengio's presentation



**Dr. Yoshua Bengio** Scientific director Mila, Co-recipient of Turing Award (2018)

I believe that there are fairly generic principles which explain our intelligence and will allow us to build machines at least as intelligent as us one day. If we don't self-destruct in the meantime. I believe that our current political-social-economic structures are not appropriate to manage the increased power which science and technology is putting in our hands.

11:00 Period of questions

11:20 Panel discussion



Carole Crawford Managing Director, CFA Institute for the Americas



William J. Kelly President & CEO, CAIA Association



Jack Inglis Chief Executive Officer of the Alternative Investment Management Association (AIMA\*)



Jane Buchan CEO, Martlet Assets Management Former Chairwoman, FDP Institute

# DAY-2 November 3<sup>rd</sup>

DAY-2 is directed to institutional assets managers. The field of machine learning in finance is evolving constantly. As technology continues to evolve and computing power increases, new use case are being identified and new applications are being developed. Presentations will therefore cover the current landscape and the challenges/pitfalls in applying machine learning to asset management and its deployment at scale. challenges & opportunities brought by the accelerating deployment of AI globally.

9:30 Chairman DAY-2



Ruslan Goyenko Associate Professor, Finance McGill University Scientific Director FIAM Innovation & Risk management Labs

9:35 **Keynote Presenters** 



**Brvan Kelly** Professor of Finance Yale School of Management Head of Machine Learning AQR Capital Management

10:00 5 min. Pause

10:05 First Panel: Leadership panel: best practices employed by US industry leaders



**Apurv Jain** Founder and CEO MacroXStudio

Panel discussion



Shanta Puchtler, CFA President Man Group



**Drew Conway** Senior Vice-President Two Sigma



Ali Almufti, CFA Director Portfolio manager Systematic Active Equity BlackRock



Lisa Huang Head of Al Investment Management and Planning Fidelity Investment

10:55 Second Panel: Challenges, advancements and use cases in the Canadian Pension **Fund Industry** 



Anne-Sophie van Royen, PHD Head, Systematic Equity

Panel discussion



Ari Shaanan Vice President Digital Strategy and Innovation



Barton Wallace, PhD. Portfolio Manager. Systematic Equity



Wei Xie Director, Co-Head of Multi-Strategy Investments Capital Markets Group OPTrust



Jon Hammond Managing Director. Data & Analytics Ontario Teacher's Pension Plan



**Tyler Haves** Managing Director, Quantitative Strategies & Risk Premia | Capital Markets & Factor Investing Dept, Canada Pension Plan Investment Board

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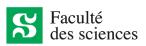


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