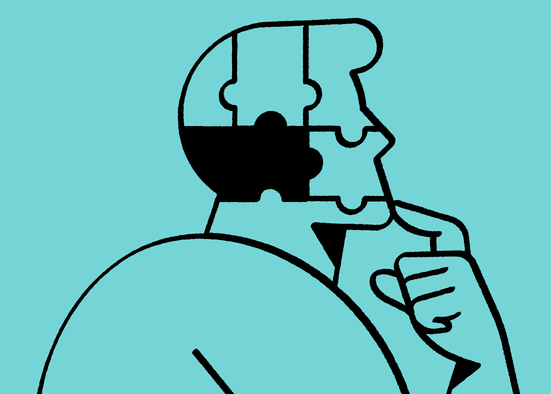
INSTITUTIONAL
INVESTOR

Public Funds Roundtable

April 27 – 29, 2026
The Beverly Hilton
Los Angeles, CA



Institutional Investor Institute
Alternative Investor Institute

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Advisory Board

Institutional Investor would like to thank the esteemed advisory members for their invaluable support and guidance in shaping our **2026 Public Funds Roundtable** program.

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- Prabhu Palani, Chief Investment Officer, **City of San Jose Department of Retirement Services**
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- Rex Kim, Chief Investment Officer, Oregon Investment Council, **Oregon State Treasury**
- Richelle Sugiyama, Chief Investment Officer, **Public Employee Retirement System of Idaho**
- Craig Husting, Chief Investment Officer, **Public School & Education Employee Retirement Systems of Missouri**
- Steve Davis, Chief Investment Officer, **Sacramento County Employees' Retirement System**
- Carina Coleman, Chief Investment Officer, **San Diego City Employees' Retirement System**
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- Jason Malinowski, Chief Investment Officer, **Seattle City Employees' Retirement System**
- Shoaib Khan, Director & Chief Investment Officer, Division of Investment, **State of New Jersey**
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- Anne-Marie Fink, Chief Investment Officer, **State of Wisconsin Investment Board**
- Michael C. Schlachter, Chief Investment Officer, **State Universities Retirement System**
- Michael Brakebill, Chief Investment Officer, **Tennessee Consolidated Retirement System**
- John Skjervem, Chief Investment Officer, **Utah Retirement Systems**
- Jon Spinney, Chief Investment Officer & VP Quantitative Investing, **Vestcor**
- Andrew Junkin, Chief Investment Officer, **Virginia Retirement System**
- Sam Masoudi, Chief Investment Officer, **Wyoming Retirement System**

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Brett Hickey, Founder & CEO, **Star Mountain Capital**

Joe Carieri, Group Managing Director - Head of Strategic Client Relationships, Global Distribution, **TCW**

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Institutional Investor Institute

Agenda

Monday, April 27, 2026

4:00 PM

Early Registration
Beverly Hills Ballroom Foyer

4:30– 5:30 PM

Private Conversations for Asset Allocators Only

A) CIOs Only

Beneficiary-Centered Governance: Aligning Strategy and Duty Within Investment Decision-Making
Beverly Hills Salon

The foundation of effective investment management, governance dominates the CIO agenda. Today's CIOs wear various hats as they navigate internal frameworks and external influences while meeting their fiduciary duty. This closed-door discussion tackles the current realities of governance: from navigating politics, policy and divestment pressures to trustee education, consultant dynamics and effective decision-making. We will also explore whether the growing trend of OCIOs in the private space will venture into the public plan arena. Come ready to share insights that will benefit your peers as we explore practical approaches to fostering better decision-making and building a culture of collaboration within your organization that keeps beneficiaries at the heart of every decision.

Session Facilitators:
Timothy Reese, Chief Executive Officer & Chief Investment Officer, **PA Municipal Retirement System**

B) Non-CIOs

A Collaborative Exchange Among Investment Professionals: Peer-to-Peer Think Tank on Using AI

In this interactive session, you'll explore how your investment peers are using artificial intelligence within their roles - from research and risk analysis to portfolio monitoring and enhancing operational efficiency. This is not a presentation —it's a collaborative exchange for sharing experiences, questions, and insights. Leave with fresh perspectives, peer-tested strategies, and a clearer roadmap for using AI effectively in your role. Come ready to actively participate! Areas for discussion include:

- What's working and what isn't: Real-world examples of AI tools and techniques in allocator environments
- Challenges and solutions: How peers are overcoming hurdles like data quality, compliance, and integration
- Actionable ideas: Practical steps to leverage AI for better decision-making and productivity

Session Facilitators:

5:30– 6:30 PM

Welcome Reception for Allocator Attendees and III and Dual Members
Beverly Hills Ballroom Foyer & California Terrace

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Tuesday, April 28, 2026

7:40 AM

Check-in Opens for Allocator Closed Door Private Breakfast
Beverly Hills Ballroom Foyer

8:00 - 8:55 AM

Private Closed Door Breakfast Discussion Exclusively for CIOs
Wilshire Ballroom

This closed-door session offers a unique opportunity to connect and discuss the issues that matter most with your colleagues. These peer-driven conversations provide a trusted space to share candid insights on challenges, exchange ideas, explore solutions and build valuable connections with your industry colleagues facing similar complexities. Come ready with questions and to share your insights.

8:00 AM

Consultants and Members Registration & Networking Breakfast
Wilshire Garden

Kick off the day by reconnecting with familiar faces, and making new acquaintances as we welcome our Consultant and Member constituents to a relaxed and informal networking opportunity over breakfast

8:55 AM

Transition

9:05 AM

Welcome and Introductory Remarks
Beverly Hills Ballroom

Catherine Martin, Senior Director of Product and Content**, Institutional Investor**

9:10 – 9:25 AM

Chair's Remarks & Polling
Beverly Hills Ballroom
Attendees will be polled on several high-interest topics using an anonymous, interactive electronic response system in the opening session and subsequent sessions. The aggregated results of the poll will be displayed instantaneously on-screen to help illuminate the discussions which follow. By doing this, we will provide all attendees with valuable benchmarks and unique insights.

Christopher Ailman, Founder & CEO, **Ailman Advisers**

9:25 – 10:05 AM

Liberation Day: One Year Later—Markets, the Economy, Policy, and the Road Ahead
Beverly Hills Ballroom

A year after Liberation Day, global markets continue to grapple with a new paradigm shaped by geopolitical realignment, the rise of national capitalism, and the possible beginning of the end of U.S. exceptionalism. Capricious tariffs, sticky inflation, and valuation pressures are testing investor resilience, while Fed independence – and future policy - faces scrutiny with a new chair on the horizon. And despite the unprecedented turmoil, markets keep climbing. Is this the new normal, or the death of it? Could we enter a stagflation environment? What will central banking look like going forward? Offering a sharp analysis through a non-partisan lens, this session examines the structural shifts driving market resilience, the forces behind persistent rallies, and what they signal for global economics and geopolitics. We'll explore valuation dynamics, Fed policy and independence, and the evolving role of the U.S. as we look at the road ahead.

Session Moderator:

Session Participants:

10:05 – 10:35 AM

Allocator Perspectives: Rethinking U.S. and Global Exposure in a New Era
Beverly Hills Ballroom

Amid the evolving domestic and international landscapes, allocators are reassessing home-country bias and the balance between U.S. and international exposures. How is the perceived end of U.S. exceptionalism, a weakening dollar, evolving trade regimes, and the rise of national capitalism impacting how allocators are viewing U.S. vs. international investments? Should allocators overweight international? What are approaches to currency risk and hedging? To what degree are allocations shifting from the U.S., and what sectors and geographies are losing/gaining from any such moves? Is now the time to reassess China? National capitalism, trade policy, and de-dollarization: what's signal vs. noise? How are allocators approaching policy-aware positioning without letting geopolitics dictate investment policy? This session's participants will share a diverse set of perspectives and approaches.

Session Moderator:
Eileen Neil, Managing Director & Senior Consultant, **Verus**

Session Participants:

10:35 - 11:05 AM

Allocator Perspectives: Public Market Investing - Broken Model or Evolving Reality?
Beverly Hills Ballroom

Once the cornerstone of investing, the public markets now compete with private alternatives that are capturing headlines and capital flows with promises of higher returns. Are the public markets broken—or just boring? With entrepreneurs shunning IPOs, big tech valuation concerns, U.S. debt levels soaring, and inflation rewriting correlation rules, is the old playbook obsolete? At the same time, private markets raise liquidity concerns and may be nearing saturation with the mountains of dry powder —why commit to long lockups if returns are flattening? Hear differing perspectives from leading allocators on how they are viewing public market investments and the balance of public and private exposures in an era of uncertainty.

Session Moderator:
Bryan Ward, Senior Partner - President, Head of U.S. Investments, **Aon Investments**
Session Participants:

11:05 – 11:30 AM

Coffee & Networking Break
Wilshire Garden (weather dependent) or Beverly Hills Ballroom Foyer

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Tracks
11:30 AM – 12:30 PM

Concurrent Tracks: Roundtable attendees have their choice of sessions in the following three tracks.

Track 1

INTERNATIONAL INVESTMENTS
Palm

11:30 AM – 12:00 PM

Around the World in 30 Minutes: The Latest on Geopolitical Risks and Emerging Investment Opportunities Within the Global Markets
Palm

Regional specialists will share their latest thinking on emerging opportunities and rising risks in this fast-paced tour of the global markets. From currency volatility and trade shifts to policy uncertainty and geopolitical hotspots, discover how these forces are shaping investment strategies. Audience participation is encouraged – come ready with questions and gain actionable perspectives on sectors, regions, and positioning for today's complex and evolving global investment landscape.

Session Moderator:
Session Participants:

12:00 – 12:30 PM

The Emerging Market Allocation Debate: Debt or Equity in the Forward-Looking Environment?
Palm

Emerging markets (EMs) offer compelling opportunities, but should investors favor debt or equity? This session explores the trade-offs between EM fixed income and equities, including valuation trends, risk-adjusted returns, currency dynamics, and the impact of policy and geopolitics. Hear differing perspectives on positioning for the most attractive opportunities today.

Session Moderator:
Session Participants:

Track 2

PUBLIC MARKETS
Dayton

11:30 AM – 12:00 PM

U.S. Public Equities: Revisiting Domestic Portfolios
Dayton

After a historic run for U.S. equities, stretched valuations, tech dominance and index concentration pose critical questions for investors. Should domestic portfolios be restructured to reduce risk and rebalance exposure? What is the right way to think about concentration? How do you manage the "tech beast" and the outsized influence of the Mag 7 without betting against growth? Are there lessons to be learned from the dot.com era? This session explores approaches to U.S. public equity portfolios, hedging strategies, lessons from past cycles, and whether cap-weighted benchmarks still make sense.

Session Moderator:
Session Participants:

12:00 – 12:30 PM

Making Cash Work Harder: The New Playbook
Dayton

Cash is essential for liquidity, but how to squeeze more efficiency from idle capital? What "cash-plus" strategies are gaining traction? How much additional risk comes with chasing incremental returns, and is it worth it? This session explores practical frameworks for optimizing cash management while preserving liquidity and security.

Session Moderator:
Session Participants:
James Ko, Deputy Chief Investment Officer, **Arizona Public Safety Personnel Retirement System**
Ryan Wagner, Chief Investment Officer, **Dallas Fire & Police Pension System**

Track 3

AI IN PRACTICE
Brighton

11:30 AM – 12:00 PM

Beyond Efficiency - AI's Role in Driving Alpha
Brighton

Generative and agentic AI are no longer just tools for operational efficiency—they're becoming catalysts for alpha generation through advanced research, analytics, and decision-making. While the potential is immense, the journey is still unfolding. This session explores how asset managers are leveraging AI today, the challenges they face—from cognitive bias and data privacy to regulatory gaps and talent needs—and what the future holds. Gain practical insights and a forward-looking perspective on AI's transformative impact on asset management.

Session Moderator:
Session Participants:

12:00 – 12:30 PM

Fundamental vs. Quantitative Investing: Blurring Boundaries in an Era of Technology
Brighton

As AI and advanced analytics reshape investment strategies, the lines between fundamental and quantitative approaches are blurring. This session explores the strengths and limitations of each style, the role of AI in accelerating convergence, and what this means for portfolio construction.

Session Moderator:
Session Participants:

12:30 – 1:40 PM

Visionary Recognition Lunch
Wilshire Ballroom

Join us for a celebratory lunch as Institutional Investor recognizes distinguished Chief Investment Officers of public pension plans for their outstanding accomplishments within investment and leadership.

1:40 – 1:45 PM

Transition

1:45 – 2:15 PM

Chasing the Golden Unicorn:
Rethinking Diversification & Risk Mitigation in the Hunt for Uncorrelated Assets in a Volatile World
Beverly Hills Ballroom

Traditional diversification is under pressure as stock-bond correlations shift as inflation challenges fixed income's role as a diversifier. How to protect portfolios in this environment? Where to get diversification if you can't rely on the negative correlation in the U.S.? This session explores gold, international markets, hedge funds, digital currencies, and other alternative diversifiers—alongside the evolving case for fixed income and what can be considered an appropriate core fixed income allocation today.

Session Moderator:
Session Participants:

Alison Romano, CEO and CIO, **San Francisco Employees' Retirement System**

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2:15 – 2:45 PM

Asset Manager Debate: To Expand or Not to Expand into Private Markets? That is the Question
Beverly Hills Ballroom

Private markets are making headlines as the next big growth opportunity, and many traditional asset managers are jumping in—but not all. In this dynamic session, hear from two leading managers with contrasting strategies: one embracing private market expansion and one staying true to core long-only roots. Explore how each views market opportunities, client needs, and partnership models, and gain insights into the strategic considerations shaping the future of asset management.

Session Moderator:
Session Panelists:

2:45 – 3:30 PM

Networking & Coffee Break:
Wilshire Garden

Alternative Investor Institute (AII) Membership Check-in and Networking

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3:30 – 4:00 PM

Spotlight Interview
Beverly Hills Ballroom

4:00 – 4:50 PM

Closing Keynote:
Is Space Investable? Exploring the Final Frontier - The Space Economy and the New Race
Beverly Hills Ballroom

4:50 – 5:30 PM

The Public Fund Roundtable Family Feud!
"Survey Says… How Well do You Know the Institutional Investment Industry and Your Peers?"
Beverly Hills Ballroom

After a day of networking and learning, it's time to put your knowledge of the industry and of your industry peers to the test. Join us for a Public Funds Roundtable light-hearted version of Family Feud and watch as our contestants battle it out on how in-tune they are when it comes to industry trivia.

Host:
Christopher Ailman, Founder & CEO, **Ailman Advisers**

Contestants:
To be announced

5:30 – 5:45 PM

Transition
Please head to the hotel lobby to depart for dinner.

5:45 PM

Depart for Reception & Dinner
Convene in the hotel lobby to depart by coach to Greystone Mansion.

6:00 PM

Cocktail Reception & Dinner: An Evening at the Greystone Mansion

Step into the grandeur of Greystone Mansion, a historic Beverly Hills estate renowned for its timeless elegance and storied past. Built in 1928 as a lavish family home for Ned Doheny, son of oil magnate Edward L. Doheny, the property reflects an era of opulence with its limestone courtyards, manicured gardens, and sweeping views of Beverly Hills. Once a private retreat featuring tennis courts, stables, and lush water features, Greystone now stands as a treasured landmark hosting exclusive events and film productions.

Tonight, experience this iconic setting—a true Beverly Hills gem—for an unforgettable evening of fine dining and great conversation.

Institutional Investor Institute (III) program concludes.

Alternative Investor Institute

Wednesday, April 29, 2026

7:45 AM

Check-in Opens for Allocator Closed Door Private Breakfast
Beverly Hills Ballroom Foyer & Wilshire Garden

8:00 – 8:55 AM

Closed-Door Breakfast Discussions Among Peers

A) Canadian Allocators Only Breakfast: A Closed-Door Discussion Among Peers
California Terrace

Canadian allocators are invited to an exclusive closed-door working breakfast. During this informal 55-minute discussion, allocators will have the opportunity to gain insights and share best practices with their peers, as well as inquiring about the challenges that are keeping you up at night.

Session Facilitator:

B) Exclusive Private Breakfast for Pension Plan CIOs
Beverly Hills Salon

The Future Investment Office: Talent, Delegation, and Technology
From attracting and retaining skilled professionals to leveraging AI for efficiency, CIOs face a new era of team building and responsibility sharing. Join this discussion on practical approaches to strengthen leadership, empower staff, and integrate technology for long-term success.

Session Facilitators:

8:10 – 8:55 AM

Networking Breakfast for All Other Attendees

8:55 – 9:05 AM

Transition

9:05 – 9:20 AM

Chair's Remarks & Polling
Beverly Hills Ballroom

Attendees will be polled on several high-interest topics using an anonymous, interactive electronic response system in the opening session and subsequent sessions. The aggregated results of the poll will be displayed instantaneously on-screen to help illuminate the discussions which follow. By doing this, we will provide all attendees with valuable benchmarks and unique insights.

Christopher Ailman, Founder & CEO, **Ailman Advisers**

9:20 – 10:00 AM

The Retailization of Private Markets: Threatening Returns or Unlocking Opportunity for Institutional Asset Owners?
Beverly Hills Ballroom

The influx of retail capital into private markets is transforming the investment landscape—and creating new complexities for institutional investors. In this candid conversation between an asset owner, an asset manager, and a consultant, we'll explore the possible implications of retailization, including return compression, liquidity risks, and governance challenges. How can asset owners adapt to protect institutional capital while meeting obligations? Join us for insights on strategy, risk management, and the long-term impact on returns and beneficiaries.

Session Moderator:
Session Panelists:
Joe Aguilar, Chief Investment Officer, **Illinois State Treasury**

10:00 – 10:35 AM

TPA vs. SAA vs. Somewhere In Between: Perspectives on Evolving Portfolio Construction
Beverly Hills Ballroom

Total Portfolio Approach (TPA) is reshaping conversations around asset allocation, challenging the traditional Strategic Asset Allocation (SAA) model. Yet TPA means different things to different institutions—and it doesn't have to be an all-or-nothing shift. This session explores how organizations are viewing and adopting elements of TPA, balancing governance, accountability, and flexibility in a combination of both TPA and SAA. We'll examine organizational implications, risk guardrails, the vulnerabilities of TPA, and whether now is the time for strategies like risk parity. Hear new approaches to integrate holistic thinking into portfolio construction.

Session Moderator:
Session Panelists:
Michael Brakebill, Chief Investment Officer, **Tennessee Department of Treasury**

10:35 – 11:15 AM

Coffee & Experiential Networking Break:
Beverly Hills Ballroom Foyer

Tracks

11:15 AM – 12:15 PM

Concurrent Tracks
Roundtable attendees have their choice of sessions in the following three tracks.

Track 1

PRIVATE EQUITY & LIQUIDITY
Palm

11:15 – 11:45 AM

Practical Approaches to Private Equity's Next Chapter: Finding Alpha Amid Shifting Dynamics
Palm

Private equity is evolving, and while structural shifts pose challenges, they also create new opportunities for forward-thinking institutions. From navigating valuation risk, liquidity trade-offs and the influx of retail capital to rebalancing across venture, growth, and buyout, this session explores practical strategies for allocators to unlock alpha in a changing landscape.

Session Moderator:
Session Panelists:

11:45 – 12:15 PM

Secondaries in Focus: Liquidity, Portfolio Upgrades, and Strategic Execution
Palm

Secondaries have moved from the sidelines to center stage—no longer just a liquidity tool but a strategic lever for portfolio transformation by rebalancing exposures, exiting aging manager relationships, and redeploying capital into higher-conviction opportunities. This session explores how institutional investors can leverage secondaries across private equity, credit, real estate, and infrastructure. From GP-led vs. LP-led deals to resource-efficient execution (team specialists and advisors – do we need them?), we will discuss practical strategies for turning shifting market dynamics into opportunities for liquidity and portfolio upgrades.

Session Moderator:

Session Panelists:
Sheila Ryan, Partner – Retirement, Insurance & Government Practice, **Cambridge Associates**

Track 2

PRIVATE MARKETS
Dayton

11:15 – 11:45 AM

Beyond the Boom: Which Private Credit Sectors & Strategies Are Best-Positioned to Sustain the Momentum?

Dayton

Private credit has surged to the forefront of alternative investing, attracting trillions in capital and spawning strategies from direct lending to asset-backed finance. But its rapid growth – and recent high-profile bankruptcies—have rattled markets and raised tough questions. Are Tricolor and First Brands the beginning of a trend or one-offs? How sustainable are returns amid opaque risk metrics and evolving structures? Are certain market sectors overcrowded? Are new investors too late to the game? This session dives into the nuances of private credit's expansion, explores where opportunities remain, and where lie the greatest vulnerabilities and risks investors must weigh in a market that's as broad as it is complex.

Session Moderator:
Session Panelists:
Keith Williams, Executive Managing Director & Chief Investment Officer, **Crestline Investors**
Senior Executive, **Edelweiss**
Clark Hoover, Investment Officer, Private Market Assets, **LACERS**

11:45 – 12:15 PM

Real Estate: From Bust to 'About to Bloom'?
Dayton

After facing significant headwinds in recent years, real estate may be at an inflection point. Rate cuts, easing valuations, and renewed demand for essential services and office space are creating tailwinds—but where are the best opportunities within the extended market? This session explores the outlook for core sectors and emerging niches. In doing so, we'll dive into all aspects of the real estate investment landscape - including secondaries, debt strategies and refinancing and re-structuring driven deals —offering practical insights on how institutional investors can capitalize on market dislocation and position for the next phase of the cycle.

Session Moderator:
Session Panelists:
Jay Glaubach, Partner & Co-Head of Global Portfolio Management, **Ares Real Estate**
Tom Masthay, Chief Investment Officer, **Texas Municipal Retirement System**

Track 3

DIGITAL ASSETS
Brighton

11:15 – 11:45 AM

The Digital Asset Ecosystem: The Practicalities Behind the 'What, Why & How' of Incorporating into Institutional Portfolios
Brighton

Exhibit A: Page 14

Digital assets are no longer theoretical—they're reshaping investment strategies. This session focuses on actionable insights for institutional investors: how to evaluate opportunities, manage risks, and determine where digital assets fit within a diversified portfolio. Hear from allocators who are implementing digital strategies and from managers across the ecosystem, including AI, blockchain and tokenization. Walk away with an understanding of the ecosystem's key components, practical allocation approaches, and what you need to know to navigate this rapidly evolving space.

Session Moderator:
Session Panelists:

Powering AI: Energy Demand, Investment Opportunities, and Portfolio Strategy
Brighton

11:45 – 12:15 PM

AI's explosive growth is driving unprecedented energy demand—especially for data centers. This session takes a practical look at what this means for investors: Are demand forecasts for power accurate? How much new capacity—renewables, gas, nuclear—will be required? Is this trend driven by hype or real structural change? Is energy transition becoming an AI-driven theme? And where do these investments fit in institutional portfolios?

Session Moderator:
Session Panelists:

12:15 – 1:25 PM

Seated Lunch

Wilshire Ballroom

1:25 – 1:35 PM

Transition

1:35 – 2:05 PM

Featured Session: Navigating the New Resource Race - Energy, AI, and Policy
Beverly Hills Ballroom

Digital assets and the AI revolution are driving unprecedented demand for energy and rare-earth elements, creating tension between innovation and sustainability. How is this surge reshaping global supply chains and influencing U.S. policy priorities? This session explores the administration's balancing act between fossil fuels and clean technologies, the geopolitical stakes of rare-earth dependency, and what these dynamics mean for investors and the future of energy markets.

2:05 – 2:50 PM

Featured Session: Disruptive Forces - AI and Crypto Redefining the Global Economic & Investment Landscape

Beverly Hills Ballroom

2:50 – 3:10 PM

Coffee & Networking Break
Beverly Hills Ballroom Foyer

3:10 - 3:40 PM

A Candid Conversation Between Allocators:
Beyond Performance: Fees, Partnerships, and the Manager Decision Process
Beverly Hills Ballroom

What really drives decisions around manager selection, re-ups, and terminations? In this candid session we examine the allocator's full decision-making process—from initial screening and due diligence to ongoing performance evaluation and mandate evolution. We'll explore the key triggers for re-evaluation, how macro shifts and organizational priorities influence choices, and what factors determine when to double down or walk away. In addition, we'll dive into the role of fees and cost structures, negotiation dynamics, and how long-term partnerships and relationships shape outcomes.

Session Moderator:
Session Panelists:
Rodney June, Chief Investment Officer, **LACERS**
Steve Davis, Chief Investment Officer, **Sacramento County Employees' Retirement System**

3:40 - 4:30 PM

Closing Keynote
Beverly Hills Ballroom

4:30 PM

Reception & Dinner - Rooftop at The Beverly Hilton

Join us at Circa 55 on the 8th floor of the Wilshire Tower at The Beverly Hilton for good food, good company and views of Los Angeles! What better way to unwind after a full day of meetings, greetings and exchanges!

Emerging Talent Academy

Institutional Investor is pleased to host the Emerging Talent Academy, presented in collaboration with the Allocator Training Institute, alongside the Public Funds Roundtable. Taking place on April 28-29 at Beverly Hilton Hotel LA, this immersive workshop is designed to equip the next generation of institutional investors with advanced portfolio management techniques and stakeholder engagement strategies.

Participants will gain hands-on experience through case studies and interactive sessions.
Each part of the Academy's curriculum has been designed around the core concepts of utility and applicability, allowing participants to build the necessary knowledge base that will be useful in their role as an institutional allocator.

- Investment Policy Statements Spending policies, benchmark selection, allowable assets
- Capital Market Assumptions Building blocks approach, implementation, and uses
- Strategic vs. Tactical Asset Allocation Setting SAA targets and their impact, tactical allocation moves
- Active vs. Passive SPIVA report findings, separating beta from alpha outcomes
- Evaluating Investment Managers Methods to assess probability of ex-ante alpha, memos
- Quantitative Tools Practical tools (Excel/Python/R) to quickly evaluate data
- Case Studies Including: Endowment troubles in '08, U Chicago '08, CalPERS (CIO turnover and tail-risk), Princeton (private asset allocation), Hartford

The program will provide frameworks, tools, and real-world insights to enhance decision-making and investment effectiveness.
This two-day workshop runs alongside the Public Funds Roundtable, offering a unique opportunity for emerging professionals to learn, network, and engage with seasoned institutional investors.

Led by Alex Ambroz, CEO of the Allocator Training Institute, and featuring industry experts.

For more information and to register, please contact:
Naina Farukh
naina.farukh@institutionalinvestor.com