

TEAM DISCOUNT OFFER: PAY FOR 3 & GET UNLIMITED* REGISTRATIONS
(Register before 15th March 2022 & Save)

International Business Review Conference Presents:

5TH ANNUAL ID&T 2022 INVESTMENT DATA & TECHNOLOGY 2022 ONLINE CONFERENCE

23rd - 24th JUNE, 2022

Optimising the use of data & technology to enhance investment decision making

**PAY FOR
3 & GET
UNLIMITED*
REGISTRATIONS**

TOPICS COVERED INCLUDE:

• Future of Investment Management: Increasing use of investment Data and technology • What is an Investment Data Management Platform and why would I need one? • Using an Investment Data Management Maturity Model to inform your investment data program • Optimising the use of good quality data to enhance Investment decision support • IBOR, ABOR and PBOR • Recent Regulatory Developments- Including Portfolio Holding Disclosure Requirements and new APRA Reporting Standards • Compliance automation- Increasing regulatory and institutional investor pressures requiring pre-trade, intra-day, post-trade compliance checks • Client reporting and the data management that supports it • Designing or reviewing your investment operating model including data & technology • The Digital Transformation of Performance Analytics, Workflow and Data Distribution • Choosing the right technology and data partners • ESG and data - Understanding ESG Data Challenges • Rising to the occasion-How data teams can make organisations date-centric

INVITED SPEAKERS INCLUDE:



DARSHIL MEHTA
Senior Manager Data Strategy,
CDAO, Australian Securities
and Investments Commission
(ASIC)



REIN VAN ROOYEN
Head of Investment
Performance & Operations,
Group Governance, QSuper



DOUGLAS ISLES
Investment Specialist,
Platinum Investment
Management Limited



CARL BACON
Chief Adviser,
Confluence (UK)



BRUCE RUSSELL
Executive Director,
Shoreline Consulting



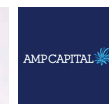
ANU KUKAR
Associate Partner, Cyber
Security - Cloud, Strategy &
Risk - Australia, IBM



NICK MORTON
Director & CIO,
Resonant



KRISHAN DAVE
Vice President, Head of
Investment Risk &
Analytical Services, Asia,
Northern Trust



ALISTAIR G REW
Global Head of Investech
Public Markets
AMP Capital (invited)



CHANELLE CRABTREE
Principal, Investment
Operations and
Outsourcing, Australia,
Cutter Associates



STEPHEN HUPPERT
Independent Consultant
& Advisor



ARNIE WACHS
Principal at
Cutter Associates



MARKO MILEK
Head of Aladdin Product
Group Asia Pacific
BlackRock

Supporting Sponsor



Researched & Developed by:

REGISTER NOW



0416260484



register@ibr.com.au



www.ibr.com.au

5TH ANNUAL ID&T 2022 INVESTMENT DATA & TECHNOLOGY 2022 ONLINE CONFERENCE

23rd - 24th JUNE, 2022

Optimising the use of data & technology to enhance investment decision making

**PAY FOR
3 & GET
UNLIMITED*
REGISTRATIONS**

DAY-1, WEDNESDAY 23RD JUNE 2022

9:00 OPENING REMARKS FROM THE CHAIR
STEPHEN HUPPERT, Independent Consultant & Advisor

9:05

FUTURE OF INVESTMENT MANAGEMENT: INCREASING USE OF INVESTMENT DATA & TECHNOLOGY

- What do new technology trends mean for investment data management? Including ML/AI, decentralized finance.
- Data costs are increasing— options & solutions for future?
- Current Trends on Outsourcing data management?

MODERATOR

STEPHEN HUPPERT, Independent Consultant & Advisor

PANELLIST

ANU KUKAR, Associate Partner | Cyber Security - Cloud, Strategy & Risk – Australia, IBM

ARNIE WACHS, Principal at Cutter Associates

DOUGLAS ISLES, Investment Specialist, Platinum Investment Management Limited

MARKO MILEK, Head of Aladdin Product Group Asia Pacific, BlackRock

9:30

WHAT IS AN INVESTMENT DATA MANAGEMENT PLATFORM AND WHY WOULD I NEED ONE ?

10:10

USING AN INVESTMENT DATA MANAGEMENT MATURITY MODEL TO INFORM YOUR INVESTMENT DATA PROGRAM

STEPHEN HUPPERT, Independent Consultant & Advisor

10:50 MORNING COFFEE

11:00

OPTIMISING THE USE OF GOOD QUALITY DATA TO ENHANCE INVESTMENT DECISION SUPPORT

- Defining data 'quality' – Quality is in the eye of the beholder. Tips on meeting the quality expectations of the investment team.
- How to make data relevant – Data is only useful if it contributes to the investment process. How can this be achieved?
- Role for 'experimental data' – How important is non portfolio data to the investment process and what models work to enable this?
- Role for DAAS Providers – How are DAAS providers such as Custodians and tech vendors servicing the data needs of the investment teams?
- What does the future hold – Where is this headed?
- What could a future look like where the promise of delivering meaningful and trusted data to the investment team is met? What benefits will this provide?

MODERATOR

BRUCE RUSSELL, Executive Director, Shoreline Consulting

PANELLIST

NICK MORTON, Director & CIO, Resonant

ALISTAIR G REW, Global Head of Investech Public Markets, AMP Capital (invited)

KRISHAN DAVE, Vice President, Head of Investment Risk & Analytical Services, Asia Northern Trust

12:10

IBOR, ABOR and PBOR



REIN VAN ROOYEN, Head of investment performance operations, group governance, Q super

12:40 LUNCH BREAK

1:30

RECENT REGULATORY DEVELOPMENTS - INCLUDING PORTFOLIO HOLDING DISCLOSURE REQUIREMENTS AND NEW APRA REPORTING STANDARDS

2:00

RISING TO THE OCCASION - HOW DATA TEAMS CAN MAKE ORGANISATIONS DATA-CENTRIC

- Getting leaders to prioritise and view data as a strategic asset
- Influence culture and ways of working to enable employees to embrace data
- Building data champions and advocates

DARSHIL MEHTA, Senior Manager Data Strategy, CDAO, Australian Securities and Investments Commission (ASIC)

2:30

ALTERNATIVE DATA & DUE DILIGENCE FOR INVESTMENT PURPOSES

This session covers key technical challenges in working with alternative data and the applications of alternative data for different parts of the investment management value chain

- Alternative Data in Institutional Investment
- Sources of Alternative Data
- Due Diligence on Alt Data providers
- Compliance considerations
- Industry guidance on alternative data

ALEX WISE, Executive Consultant, Castle Hall Alternatives (Invited)

3:00

ESG AND DATA - UNDERSTANDING ESG DATA CHALLENGES

- Is lack of robust data being currently the biggest obstacle to environmental, social and governance (ESG) integration?
- Solving the ESG data challenge
- Learn how to effectively incorporate ESG data into your strategy

3:30

IS YOUR INVESTMENT OPERATING MODEL STILL FIT FOR PURPOSE?

- How long since you have reviewed your investment operating model?
- Why should you review your investment operating model?
- Has it kept up with the technology and data requirements of your organisation?

PANELLIST

MARKO MILEK, Head of Aladdin Product Group Asia Pacific, BlackRock

CHANELLE CRABTREE, Principal, Investment Operations and Outsourcing, Australia, Cutter Associates
Other panel members TBA

4:10 CLOSING REMARKS FROM THE CHAIR

5TH ANNUAL ID&T 2022 INVESTMENT DATA & TECHNOLOGY 2022 ONLINE CONFERENCE

Optimising the use of data & technology to enhance investment decision making

**PAY FOR
3 & GET
UNLIMITED
REGISTRATIONS**

DAY-2, THURSDAY 24TH JUNE 2022

9:00 OPENING REMARKS FROM THE CHAIR

STEPHEN HUPPERT, Independent Consultant & Advisor

9:05 THE DIGITAL TRANSFORMATION OF PERFORMANCE ANALYTICS, WORKFLOW AND DATA DISTRIBUTION

CARL BACON, Chief Adviser, Confluence (UK)

9:40 INFORMING INVESTMENT DECISIONS USING MACHINE LEARNING AND ARTIFICIAL INTELLIGENCE

- Machine learning -What is it and why does it matter?
- Discussing the benefits and challenges of Machine Learning and Artificial Intelligence
- Contextualised examples of how people have used ML for real life work problems
- Is AI and Machine learning real or just a fad? and is it worth investing in?
- How do you continuously optimise and test the accuracy of models?
- Sharing experiences on AI and ML

10:40 DATA MANAGEMENT ACROSS TECHNOLOGY AND OPERATIONS

- Where does Data Management sit in Australian funds management organisations currently?
- The misconceptions associated with Data Management (particularly as they relate to Australian funds management)
- Where should Data Management sit in the organisation?
- How do we bridge the gap between Technology and Business Operations?
- What components make for "Best Practice" in Data Management?
- Sharing experiences on AI and ML

11:20 GETTING VALUE FROM YOUR INVESTMENT IN DATA AND INSIGHTS

- How do you know that what you are spending money on is adding value to the business?
- Are your business users getting what they need, when they need it and in the format they need it in?
- Are your dashboards getting used as designed?
- How good is your organisation at turning data and insights?

12:00

FUTURE OF DATA GOVERNANCE IN AN AI WORLD

PANEL DISCUSSION

To succeed in a data-driven world, it is critical that businesses have an effective data governance strategy in place to truly maximise the full potential of their information assets – and, by extension, the potential of AI.

In this session, discover how having an effective data governance strategy will not only provide the agility needed to keep up with the increasing technological demand, but in addition prepare your business for the legislative requirements yet to come.

12:40

CLOSING REMARKS FROM THE CHAIR



Sponsorship & Exhibition Opportunities

Investment Data 2022 online event offers sponsors an excellent opportunity to demonstrate thought-leadership and build brand-value amongst your target audience. If you would like to know more about sponsorship & speaking opportunities please just get in touch with us -

sponsorship@ibrc.com.au

5TH ANNUAL ID&T 2022 INVESTMENT DATA & TECHNOLOGY 2022 ONLINE CONFERENCE

Optimising the use of data & technology to enhance investment decision making

**PAY FOR
3 & GET
UNLIMITED
REGISTRATIONS**

2 DAYS ONLINE FORUM

☐ Early Bird - \$1,490+ GST (Register before 15th March & save)

☐ Normal Rate - \$1,890 + GST

GROUP REGISTRATION: – UNLIMITED REGISTRATION OFFER*

☐ Group Registration: Pay for 3 delegates to get the unlimited delegate registration offer from the same company.

UNABLE TO ATTEND THE ONLINE CONFERENCE

☐ Purchase the conference recording

* Only one discount applies per registration

* Group Registration: Paid with normal rate and you can register unlimited members only from the same business

* Payment not made at the time of registration will be subject to a \$50 service charge.

* All 'Early Bird' discounts & Group discounts are subject to availability and require payment at time of registration and before the cut-off date in order to receive any discount.

* All discount offers cannot be combined with any other offer.

* Please view our registration policy for full information about payment, cancellation, postponement, Substitution and discounts.

DELEGATE REGISTRATION

1st Delegate Name (Dr/Mr/Mrs/Ms) _____

Job Title: _____

Telephone: _____ Fax: _____

Email: _____

2nd Delegate Name (Dr/Mr/Mrs/Ms) _____

Job Title: _____

Telephone: _____ Fax: _____

Email: _____

3rd Delegate Name (Dr/Mr/Mrs/Ms) _____

Job Title: _____

Telephone: _____ Fax: _____

Email: _____

4th Delegate Name (Dr/Mr/Mrs/Ms) _____

Job Title: _____

Telephone: _____ Fax: _____

Email: _____

Company Name: _____

Address: _____

Telephone: _____ Fax: _____

Approving Manager (Dr/Mr/Mrs/Ms) _____

Email: _____

Job Title: _____

Telephone: _____ Fax: _____

Booking Contact (Dr/Mr/Mrs/Ms) _____

Email: _____

Job Title: _____

Telephone: _____ Fax: _____

For additional delegates please photocopy this form.

EASY WAYS TO PAY

PLEASE CHARGE CREDIT CARD

☐ Bankcard ☐ Visa ☐ Mastercard ☐ Diners ☐ Amex

(3% Credit card fee will apply for Diners & Amex)

Credit Card Number

Expiry date __/__/__ Amex 4 digit code _____ Amount \$ _____

Name of card holder _____

PAY BY CHEQUE - CHEQUE ENCLOSED FOR \$ (Cheques payable to IBR conferences)

PAY BY EFT - Remitting to IBR Conferences - BSB-082201 A/C No-87 367 0855 with National Australia Bank, 300 Victoria Ave, Chatswood NSW 2067, Sydney

Expected date of transfer..... EFT reference No.....

☐ I do not wish to receive any more mail from IBR conferences

GROUP DISCOUNT For 3 or more people, phone 02 9896 0776.

FOR CONFERENCE PAPERS: info@ibrc.com.au

CANCELLATION POLICY visit our web site or call **02 9896 0776**.

PRIVACY POLICY Visit our web site at **www.ibrc.com.au**.

INSURANCE: Registration fees do not include personal, travel or medical insurance of any kind. Delegates are advised when registering for the workshop and booking travel that a travel insurance policy be taken out to cover loss, cancellation, medical cover, etc for any reason. IBR Conferences do not take any responsibility for any attendees failing to insure.

DISCLAIMER: IBR Conferences reserves the right to change the speakers, venue, dates or alter or delete items from the program as circumstances dictate and takes no responsibility for any errors, omissions and changes.

ABN 72124362607

CONTACT US FOR REGISTRATION

PHONE: (+61) 0416260484

EMAIL: register@ibrc.com.au

WEB: www.ibrc.com.au

SPONSORSHIP OPPORTUNITIES

e-mail: sponsorship@ibrc.com.au