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International Business Review Presents:

2nd Annual **INVESTMENT DATA 2019**

Investment Data Management, Analytics & Technology Forum

30-31 May 2019, Sydney



Early Confirmed speakers.



Eben Van Wyk
Portfolio Manager,
First State Super



Ritchard Longmire
Senior Portfolio Manager,
Invesco Australia



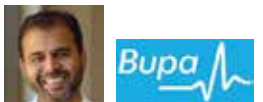
Carl Bacon
CIPM Founder, Freedom
Index Company, (UK)



Sam Millar
Senior Manager, Performance
Analytics, NSW Treasury
Corporation (TCorp)



Lisa Zavaroni
Data Governance Lead
MetLife



Darshil Mehta
Head of Data Governance,
Bupa Australia & New Zealand



Charles Wu
Deputy CIO and GM DC
Investments, State Super



Nick Morton
Director, Portfolio Manager,
Resonant Asset Management



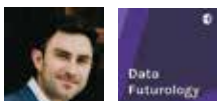
Andrew Ward
Managing Director
SelfWealth



Jason Warlond
Head of Business
Development, APAC,
Curium Data Systems



Darthea Clydsdale
Information Risk Manager,
QIC



Felipe Flores
Founder and Podcast Host
Data Futurology



Bridget Nichols
Senior Manager Data
Governance Lead, ASX



Alex Wise
Executive Consultant,
Castle Hall Alternatives



Arthur Roumeliotis
Partner, Longreach Harvest
Quant Investors



Prof. Guandong Xu
Professor in Data Science,
Advanced Analytics Institute,
University Technology Sydney



Ben Watson
CEO, Maroon Analytics
Australia

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2nd Annual **INVESTMENT DATA 2019**

Investment Data Management, Analytics & Technology Forum

30-31 May 2019, Sydney



About the event:

Digital transformation, increasing regulation and a changing economy means it is now crucial to advance in high-quality analytical investment data tools, analytics, and technology to support investment decisions, customize data, present more visually compelling information, and streamline workflow.

This conference will address the following topics, along with bringing together investment professionals to share new strategies, guidance, and best practices to help you build a future based on data you can trust, agile analytics you can rely on, and how Machine Learning and AI may help your business and investment decisions.

Here's a sneak peak of topics covered throughout this event;

- Factor Investing in the era of Data Science
- The benefits and Approaches to Quantamental Investing
- Informing Investment Decisions Using Machine Learning and Artificial Intelligence
- Alternative Data & Due Diligence for Investment Purposes
- The increasing importance of Data Governance, especially if you are on a Big Data Journey
- Sharing Experiences on Data management and Data Governance

***Limited exhibit space and sponsorship packages are available.**

Who Should Attend:

- Heads of investment risk, performance and client reporting
- Portfolio Managers
- Data Governance
- Chief operating officers / heads of investment operations
- Heads of technology
- Chief risk officers / heads of risk & compliance
- Chief financial officers

From the following Industries:

- Superannuation
- Investment & Fund Managers
- Insurance
- Banking
- Securities trading
- Technology

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- Demonstrate thought leadership and create trust
- Make face-to-face connections and generate leads
- Collect intelligence on your target market's key challenges
- Network with senior leaders and forge key relationships

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Speakers



Ritchard Longmire, Senior Portfolio Manager, Invesco Quantitative Strategies

Ritchard Longmire, based in Melbourne, is a Senior Portfolio Manager in the Invesco Quantitative Strategies (IQS) team. He is responsible for managing Australian equity portfolios (Core, 130/30 long/short, and Smaller Companies).

Ritchard has over 19 years' experience in Australian equity and capital markets, working in quantitative portfolio management, research and analysis, and economics. Prior to joining Invesco in February 2018, Ritchard was with BlackRock, Barclays Global Investors, and Tactical Global Management. Ritchard holds a Bachelor of Economics (honours) from Monash University.



Arthur Roumeliotis, Partner, Longreach Harvest Quant Investors (LHQI)

Mr. Roumeliotis is a founding partner of LHQI, specialising in machine learning to produce alpha across global equity markets to provide clients a return stream using machine learning that is best of breed and differentiated to the established Quantitative managers.

Prior to forming LHQI, Mr. Roumeliotis was Senior Portfolio Manager and founding member of BGI Australia (BGIA) responsible for managing its entire set of Australian Equity portfolios, including trading and research.

Following his time at BGA, Mr. Roumeliotis was made Head of Quantitative Sales at Macquarie Bank jointly responsible for managing its #1 rated Quant Research team. As Head of Investments, he then helped establish Macquarie's very successful MQ hedge fund business, which today still remains one of Asia's most successful equity hedge fund businesses.

Arthur moved to JANA Investment Advisers in 2006 as Head of Absolute Return Fund Research and member of the Investment Committee, responsible for advising and guiding some of Australia's largest institutional clients in their hedge fund allocation during the GFC.

In 2010 Arthur left Australia to expand his expertise to Asia as Head of Portfolio Strategy with Prudential Asia Asset Management (PAAM) - responsible for the strategy and research of PAAM's \$US 25bn of Asian and Emerging Market equity funds, including the design and management of their very successful and large Asian low volatility income fund.



Bridget Nichols, Senior Manager, Data Governance Lead, ASX

I am a corporate advisor specialising in data governance, innovation and strategy. I am a skilled change agent and enjoy structuring/managing complex transformation programs. I have extensive experience of building and implementing data governance programs and regulatory control frameworks. I am a founding contributor to the establishment of four greenfield businesses in the financial markets and telecommunications industries, all of which remain in operation (and profitable) today. I am excited by the challenge of using data more effectively, and enabling decision making through data analytics and AI.



Darshil Mehta, Head of Data Governance, Bupa Australia & New Zealand

Experienced, passionate, and self-starter professional having substantial experience in IT industry mainly Data Management area. Worked in the U.S., Singapore, India, and Australia. Experience spans across all phases of Information Management focused projects like Big Data, Data Warehouse, Business Intelligence, Data Quality, Data Governance, establishing data operations starting from conceptualization to completion.



Speakers



Dr Guandong Xu, Associate Professor, Faculty of, Engineering and IT, University of Technology, Sydney
Dr Guandong Xu is an Associate Professor at School of Software and Advanced Analytics Institute at Faculty of Engineering and IT, University of Technology, Sydney. Currently he leads the Data Science and Machine Intelligence lab consisting of 15 Postdocs, Research Associates, and Research Students, and takes the role of Computing Science (honours) Program Coordinator at FEIT. Guandong has had 190+ publications in the areas of Data Science, Machine Intelligence, Recommender Systems, NLP, and Social Computing. Since 2015, he has led a dozen of research and industry projects in data science, predictive analytics, behaviour analytics, risk modelling, and customer engagement, gaining income totalling over \$3M from ARC, governments, and industries. As recognition of his research impact and industry contribution, his team has been awarded the 2016 BigInsight Data Innovation Award in "Best Customer Insights", 2017 Australian Marketing Institute Marketing Excellence Award NSW winner in "Consumer Research Insights" and "Customer Retention", 2018 Top 10 Analytics leaders by Institute of Analytics Professionals of Australia, and Best Industry Application of Data Analytics and AI winner of 2018 BigInsights Data and AI Award.



Eben Van Wyk, Portfolio Manager, First State Super

Eben works at First State Super - a \$90bn asset owner - where he helps to build and manage active and customised Systematic Equities portfolios. Eben applies Machine Learning models to predict uncertainties within the stock market, as well as models that predict their client behaviours. This is in addition to his usage of more established Data Science methods for active stock selection, risk modelling and portfolio optimisation. Previously Eben filled a variety of roles within funds management, trading and research while in Sydney and London.



Lisa Zavaroni, Data Governance Lead, MetLife

Lisa Zavaroni currently leads Data Governance for MetLife Australia. Lisa is responsible for maturing the Data Governance programme in alignment with MetLife Global Data Governance compliance standards and reducing operational risk. Lisa has an extensive 15 years' experience working in financial markets specialising in data remediation and data quality strategies. Prior to working at MetLife Lisa spent 7 years at National Australia Bank in various roles in managing business and sales performance analytics across multiple distribution groups. Lisa's work has been strongly focuses on mitigating risks for businesses having created risk probability assessment models for regulatory reporting and tools to identify risks, Lisa has worked directly with senior leadership teams in decreasing the risk of privacy breaches and reputational damage.

2nd Annual INVESTMENT DATA 2019 Investment Data Management, Analytics & Technology Forum

30-31 May 2019, Sydney



Conference Day One: Thursday, 30th May, 2019

8:30 COFFEE & REGISTRATION
9:00 OPENING REMARKS FROM CONFERENCE CHAIRPERSON
9:10 DISTRIBUTION OF PERFORMANCE & RISK ANALYTICS DATA


- Middle Office Stakeholders
- Today's engagement process
- Self-service analytics

Carl Bacon, CIPM Founder, Freedom Index Company, (UK)
9:50 FACTOR INVESTING IN THE ERA OF DATA SCIENCE

Data science, machine learning, artificial intelligence, big data – are popular terms that have become synonymous with systematically driven strategies. Factor investing has been a part of the investment landscape for over two decades, so how have advances in data availability and computing power affected factor investing as an investment approach? Does data science help bolster the case for factor investing or threaten its existence?

- Discussion of the pitfalls that we had to learn about from previous "cutting edge" technologies
- Assessing where we are and how we got here
- An overview of how different challenges were tackled in the old days
- Giving some perspective on how to tackle contemporary challenges


Ritchard Longmire, Senior Portfolio Manager, Invesco Australia
10:30 NETWORKING MORNING TEA

Case Study

11:00 THE BENEFITS AND APPROACHES TO QUANTAMENTAL INVESTING

Resonant's investment philosophy is to combine quantitative and fundamental approaches together – because they tend to work at different points in the cycle, it makes consistent alpha delivery more likely

- SWOT analysis on fundamental and quantitative investing
- Combining man (fundamental & judgment) and machine (quantitative & systematic) – lessons from the airline industry
- The importance of quantitative feedback loops in learning from our mistakes & incrementally making decisions on the portfolio to generate alpha
- How does the combined quantamental process look and how do clients benefit?


Nick Morton, Director, Portfolio Manager, Resonant Asset Management

Panel Discussion

11:40 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



Panellists:

Arthur Roumeliotis, Partner, Longreach Harvest Quant Investors
Eben van Wyk, Portfolio Manager, First State Super
Ben Watson, CEO, Maroon Analytics Australia
Charles Wu, Deputy CIO and GM DC Investments, State Super
12:30 NETWORKING LUNCH BREAK
13:30 DATA MANAGEMENT ACROSS TECHNOLOGY AND OPERATIONS

Jason Warlond, Head Of Business Development, Apac, Curium Data Systems
14:10 APPLYING DISRUPTIVE PREDICTIVE ANALYTICS AND AI

- Introduction and business challenges to tackle
- Data-driven underwriting automation and optimisation in insurance
- Deep analytics for better super investment practice
- Incorporating socially responsible investment metrics for portfolio optimisation
- Conclusion


Dr Guandong Xu, Professor in Data Science, Advanced Analytics Institute, University Technology Sydney
14:50 AFTERNOON TEA
15:20 ALTERNATIVE DATA & DUE DILIGENCE FOR INVESTMENT PURPOSES

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


Alex Wise, Executive Consultant, Castle Hall Alternatives
16:00 A PRESENTATION ON MANIPULATING DATA


Session abstract to follow

Andrew Ward, Managing Director, SelfWealth
16:40 Closing Remarks from Conference Chairperson
Networking Drinks

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Investment Data Management, Analytics & Technology Forum

30-31 May 2019, Sydney



Conference Day Two: Friday 31st May, 2019

8:30 COFFEE & REGISTRATION

9:00 OPENING REMARKS FROM CONFERENCE CHAIRPERSON

9:10 CURRENT INVESTMENT DATA MANAGEMENT & GOVERNANCE INDUSTRY PRACTICES

9:50 ROUNDTABLE DISCUSSION: EXPLORING THE DATA, ANALYTICS AND REPORTING LANDSCAPE

Facilitator:**Sam Millar**, Senior Manager, Performance Analytics, NSW Treasury Corporation (TCorp)

10:30 NETWORKING MORNING TEA

11:00 FUTURE OF DATA GOVERNANCE IN AN AI WORLD

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.

**Lisa Zavaroni**, Data Governance Lead, Metlife

11:40 CYBERSECURITY RISK AND DRIVE PROGRAMS ACROSS QIC TO IMPROVE RESPONSE AND READINESS FOR CYBER ATTACKS

- Threat analysis – how intelligence surrounding current attacks can be used to strengthen the control environment
- End user awareness – how to make cybersecurity stick
- Incident response – building a resilient management team

**Darthea Clydsdale**, Information Risk Manager, QIC

12:30 NETWORKING LUNCH BREAK

11:30 THE INCREASING IMPORTANCE OF DATA GOVERNANCE, ESPECIALLY IF YOU ARE ON A BIG DATA JOURNEY

Organizations want to leverage the power of Big Data, whether from business opportunity perspective or data value perspective, or from technology perspective. But how to Govern Data in this new world?

- Significance of Data Governance in Financial industry
- What basics should be in place for implementing a Data Governance framework?
- Assessing then Data eco system
- Giving a perspective on how technology is vital in implementing Data Governance on a Big Data environment

**Darshil Mehta**, Head of Data Governance, Bupa Australia & New Zealand

14:10 A PRACTICAL GUIDE TO WHAT YOU WILL NEED FOR YOUR ANALYTICS PLATFORM

- Why analytics is hard to do
- Data quality and data relationships
- Flexibility v consistency
- What a modelling interface should look like
- Portfolio modelling in Python

**Ben Watson**, CEO, Maroon Analytics Australia

14:50 AFTERNOON TEA AND NETWORKING

15:20 MACHINE LEARNING & ARTIFICIAL INTELLIGENCE FOR HUMANS

- The majority of ML/AI is built for machines (i.e. automation), this focus leaves too many unexplored opportunities
- Improve decision making, find new opportunities and minimise blind spots with ML for Humans
- Find out how to get ML/AI working for you and your organisation
- Examples of what this looks like in practise

**Felipe Flores**, Founder and Podcast Host, Data Futurology16:50 Closing Remarks from Conference Chairperson
Networking Drinks

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