

Factors: The Next Era in Portfolio Construction



Tuesday, May 9 | 1:00pm ET / 10:00am PT

Join BlackRock and industry thought leaders for a two-hour virtual conference, **Factors: The Next Era in Portfolio Construction**, discussing innovations in asset management, the world of factors and how clients are implementing factors in their portfolios.

***This event is approved for 1.5 CFP/CIMA CE credits. All sessions marked must be watched in their entirety in order to be awarded credit.**

Time	Topic
1:00 pm - 1:15 pm	<p>Driving Investing Innovation through Technology* <i>Laurence Fink, BlackRock's Chairman and CEO</i> <i>Mark Wiedman, BlackRock's Global Head of iShares</i></p> <p>A conversation with Larry Fink and Mark Wiedman on the evolution of the asset management industry and how technology and innovation are enabling investors to achieve better outcomes.</p>
1:15 pm - 1:35 pm	<p>Factors: The Future of Investing* <i>Dr. Andrew Ang, BlackRock's Head of Factor-based Strategies Group</i> <i>Martin Small, BlackRock's Head of U.S. iShares</i></p> <p>A fireside chat with Dr. Andrew Ang and Martin Small on factors – what they are, what's driving their growth in portfolios and what's on the horizon.</p>
1:35 pm - 2:25 pm	<p>Factor Roundtable* <i>Dr. Andrew Ang, BlackRock's Head of Factor-based Strategies Group</i> <i>Rob Arnott, Research Affiliates</i> <i>Ronen Israel, AQR</i> <i>Cam Harvey, Duke Professor</i></p> <p>Highlights from an Institutional Investor Journals hosted panel discussion on the different philosophies behind factor investing with some of the most respected names in factor investing in the industry.</p>
2:30 pm – 3:00 pm	<p>Client Perspectives: Putting Smart Beta to Work <i>Bill Stone, PNC</i> <i>Dan Cupkovic, ARGI Investment Services</i> <i>Jorge Lopez-Quintana, Merrill Lynch</i> <i>Hollie Fagan, BlackRock's Head of the Registered Investment Advisor Group</i></p> <p>A client panel discussion moderated by Hollie Fagan. Clients will share their perspectives on factors and how they are incorporated into their investment process.</p>
3:00 pm - 3:20 pm	<p>Creating a Modern Portfolio <i>Brett Mossman, BlackRock's Head of Portfolio Solutions</i> <i>Holly Framsted, CFA, Senior Smart Beta Strategist</i></p> <p>A discussion with Holly Framsted and Brett Mossman on how to establish a disciplined investment process and take a thoughtful view of combining ETFs, high conviction alpha, and factors.</p>