SPEAKING ENGAGEMENTS

Bodhi Research Group
Dr. Ranjan Bhaduri
Founder, President & CEO

2023

Guest Lecturing at Columbia University in New York City, USA (June 2023)

Speaker on "Solving Investor Needs: Converting Operational Risks into Operational Alpha" at Talking Hedge Toronto in Toronto, Canada (June 2023)

Judge at the 2023 Weal5th Professional Awards in Toronto, Canada (June 2023)

Bodhi Research Group Annual Symposium 2023 in Toronto, Canada (May 2023)

Moderator on "Canadian Pension Funds Focus on Quantitative Strategies" at Battle of the Quants in New York City, USA (May 2023)

Speaker on "Views from the Investment Consultant Community Panel" at Citi / MFA Canada Alpha Generation Symposium in Toronto, Canada (March 2023)

Speaker on "Demystifying Managed Account Platforms" at the Maples Investment Funds Forum in the Cayman Islands (February 2023)

Speaker on "Emerging Managers: How do you Diligence Them and What is their Value in a Portfolio?" at the iConnections Global Alts in Fontainebleau, USA (January 2023)

2022

MIT Sloan Quantitative Conference in Boston, Massachusetts (December 2022)

Guest Lecturing on Due Diligence in Alternative Investments at DePaul University in Chicago, USA (November 2022)

5-Year Bodhi Research Group Symposium in Toronto, Canada (September 2022)

Speaker on "Creative ways of tackling volatility – Are alternatives the way to go?" at the TSAM Conference in Toronto, Canada (September 2022)

Speaker on "Navigating to Tomorrow: Investing in Alternative Investments and Hedge Funds" at the Wealth Today Summit in Dubai, UAE (June 2022)

Guest lecturer on alternative investments at University of Toronto (May 2022)

The Razor’s Edge – Portfolio Perspectives + PrudenceSpeaker in "Offsetting Inflation: The

Opportunity Set in Commodities", TalkingHedge in Austin, Texas (April 2022)

Speaker on "Portfolio Construction During COVID-19 and Industry Success Insights" at the University of Toronto (January 2022)

2021

Guest Lecturer on industry success at Rotman School of Management, University of Toronto (November 2021)

Moderator and speaker in the 2021 CAASA – Canadian Association of Alternative Strategies and Assets Annual Conference (November 2021)

Moderator at TuesdayTalks on "The Alpha Not Taken" (June 2021)

Speaker at Institutional Connect's Fixed Income & Credit Investments Virtual Forum on "Managing Volatility and Achieving Consistent Returns: Alternative Fixed Income Strategies" (June 2021)

Speaker at the TalkingHedge Smart Portfolio Construction & The Benefits of Diversification on "More Art than Science: The Critical Importance of Qualitative Due Diligence" (March 2021)

Moderator at the M-X Webinar on "Macro Strategy & Quantitative Investing" (February 2021)

Speaker on the University of Chicago Financial Mathematics – Careers in Alternatives Panel (January 2021)

2020

Panelist at the Tactical Investor Trading Forum on “ESG and Tactical Trading” (December 2020)

Moderator at the Talking Hedge Customization is Key Conference on "Dealing with Unpredictable Markets: What New Solutions Are There?" (November 2020)

CAASA Annual Conference (November 2020)

Moderator on "Emerging Managers in an Institutional Portfolio"

Moderator on "Pension Fund Case Studies on Peer-to- Peer Lending & Repo"

Moderator on "Q&A Session Keynote Speech: Trends in the Canadian Economy"

Moderator on M-X Webinar on "Enhance Momentum Strategy Returns – Canada CTA Model" (October 2020)

Speaker on "Institutional Connect Conference on Portfolio Resilience During Times of Volatility (October 2020)

Speaker on" Portfolio Construction: Building Portfolio Resilience, Rebalancing, and Liquidity"

Guest Lecturer at University of Toronto Investments course on "The Razor's Edge: Portfolio Perspectives + Prudence" (October 2020)

Moderator at CAASA Family Office Summit on "ESG & Impact Investing – What it Means, and What it Can Mean For You" (August 2020)

Speaker in Alternative Alpha Strategies Roundtable (virtual) (July 2020)

Panelist at CAASA Webinar on "How Do You Do Operational Due Diligence on a Fund Under Quarantine?" (May 2020)

Speaker on CAASA Podcast on "The Recent Crisis (April 2020)"

Guest Lecturer at the University of Hawai'i - Undergraduate Course on "Principles of

Microeconomics"- Honolulu, USA (March 2020)

Speaker at AKAMAI Foundation - Honolulu, USA (March 2020)

Panelist at McGill University on "Career Advice to Undergraduates" - Montréal, Canada (January 2020)

2019

Panelist at the CAASA Annual Conference on "Evaluation of Hedge Funds" - Montréal, Canada (November 2019)

Panelist at Emerging Manager Forum's CTA Expo on "Big Data: It's Impact on Trading Strategies, Managers, and Investors" - Chicago, USA (September 2019)

Guest Lecturer at Columbia University in Professor Gunter Meissner's course on "Topics in Quantitative Finance" - New York, USA (June 2019)

Panelist at the Talking Hedge Conference on "ESG Matters: Raising the Governance Bar in an Increasingly Tech-Driven World " - Toronto, Canada (June 2019)

Speaker at Wells Fargo Educational Series on "Big Data, Machine Learning, and Artificial Intelligence" - New York, USA (May 2019)

Speaker at The Summit of Asset Management on "Systematic Trading - On the Edge of Change?" - Toronto, Canada (May 2019)

Speaker at CAASA Family Office Summit on "Focus on Investment Due Diligence" - Toronto, Canada (May 2019)

Speaker at the GAIM Ops Caymans on "Case Studies of Outsourcing, Automation Case Studies & Third-Party Vendor Diligence" - Grand Cayman, Cayman Islands (April 2019)

Judge at the 12th Annual Telfer Financial Case Competition, University of Ottawa - Ottawa, Canada (March 2019)

Guest Lecturer at the University of Toronto in Professor Bing Han's course on Investments - Toronto, Canada (March 2019)

Speaker at the Talking Hedge Conference on "Alpha Creation with Operational Transparency & Connectivity" - San Francisco, USA (March 2019)

2018

Fireside Chat at the Canadian Annual Derivatives Conference on Central Banks with Sheryl King of the Bank of Canada - Quebec City, Canada (November 2018)

Moderator at CAASA Annual Conference on "Building a Portfolio of Hedge Funds to Deliver Absolute Return" - Montreal, Canada (November 2018)

Fireside Chat at Tactical Trading Investor Forum on “Quantitative Trading and Machine Learning” - New York, USA (October 2018)

Panelist at Global Fund Forum on "Finding Alpha in 2019" - New York, USA (October 2018)

Panelist at Texas Hedge Fund Association Seminar on "Ten Years Later: Outlook and Lessons From The Fall" - Dallas, USA (September 2018)

Speaker at CTA Expo Emerging Manager Forum on "The Alternative Industry... Where We Are, Where We Are Going" - Chicago, USA (September 2018)

Guest Lecturer at Columbia University on “Correlation Risk Modeling & Management” - New York, USA (June 2018)

Panelist at CAASA Breakfast Panel on “What Investors Want” - Toronto, Canada (June 2018)

Moderator at Talking Hedge Conference on “How to Beat a 60/40 Benchmark Through Diversification” - Toronto, Canada (June 2018)

Moderator at PRMIA Luncheon Seminar on “Machine Learning and Its Applications in Investment and Risk” - Edmonton, Canada (May 2018)

Speaker at TSAM Toronto on "Liquidity Risk, Structural Alpha and Portfolio Construction" - Toronto, Canada (April 2018)

Host on “Understanding Managed Account Platforms - from A to Z" at GAIM Ops - Grand Cayman, Cayman Islands (April 2018)

Panelist at the Crestbridge Breakfast Seminar on “The Benefits of Jersey as your Gateway to European Investors” - New York, NY (April 2018)

Judge at the 11th Annual TMX Financial Case Competition - Ottawa, Canada (March 2018)

Panelist at McMaster University on "What Graduates Need to Know About the Canadian Alternatives Industry" - Hamilton, Canada (February 2018)

Panelist at HFM Canada Operational Leaders Summit on “The Evolving Role of the COO: What New Skills and Expertise are Required?” - Toronto, Canada (February 2018)

Moderator at the University of Toronto’s MMF Symposium on “Hedge Fund Theme Park – Global Perspective of Institutional Investors, Industry Themes, and Broader Alternatives Universe” - Blue Mountains, Canada (January 2018)

2017

Panelist at New Era for Regulatory Risk on “Evolving Role of the Chief Risk Officer: Before & After 2008” - New York, USA (November 2017)

Moderator at Canadian Annual Derivatives Conference on “Quantitative & Systematic Trading – On the Edge of Change?” - Quebec City, Canada (November 2017)

Moderator at PRMIA Canadian Risk Forum on “Luncheon: Risk Management in Hedge Funds from the Institutional Investor Perspective” - Montreal, Canada (November 2017)

Speaker in Dubai Investor Forum - Dubai, UAE (November 2017):

> Panelist on “Strategically Timing your Asset Allocations” Panelist on “Riding the Wave The Latest Research About the Managed Futures Industry”

Panelist at the Global Fund Forum on “ODD: The Final Step - What Investors Expect” - Southampton, Bermuda (October 2017)

Guest Lecturer at McMaster University on MBA Multidisciplinary Entrepreneurship - Burlington, Canada (October 2017)

Speaker at AIMA Canada Investor Forum - Montreal, Canada (September 2017):

Panelist on “Managed Futures – Riding the Wave”

Moderator on “Portfolio Construction of Hedge Funds & Alternative Beta”

Moderator on “Asset Allocation and Portfolio Construction”

Panelist at the CTA Expo Chicago on “Platforms – Their Selection For Use of Managers and Investors” - Chicago, USA (September 2017)

Moderator at AIMA Canada Research Luncheon on “Fact(or) Fiction: The Truth About Factor Investing” - Toronto, Canada (May 2017)

Panelist at the Goldman Sachs Systematic Investing Conference on the topic of “Institutional Investors in the Systematic Marketplace” - New York, USA (May 2017)

Speaker at GAIM Ops Caymans Conference – Grand Cayman, Cayman Islands (April 2017):

Panelist on “Increased Investor Transparency” Round-Table Host on “Structural Alpha”

Panelist at The Modernization of Due Diligence for Alternative Investments Conference on “Due Diligence:

Assessing Transparency, Service, Customized Products” - New York, USA (April 2017)

Panelist at the Alternative Investment Management Summit on “Proving the Case: Can You Time Hedge Funds, and Should You?” - Abu Dhabi, UAE (March 2017)

Presenter at the Battle of the Quants on "New Methods in Conducting Due Diligence on Quantitative Strategies" - Frankfurt, Germany (March 2017)

Facilitator at the HFM Week Canada Operational Leaders’ Summit on “The Operational Due Diligence Line-up: A Multi-Perspective View of Due Diligence” - Toronto, Canada (February 2017)

Moderator at University of Toronto’s MMF Symposium on Alternative Beta - Blue Mountains, Canada (February 2017)

2016

Moderator at the Canadian Annual Derivatives Conference on Global Macro Investing - Quebec City, Canada (December 2016)

Panelist at the Battle of the Quants London on “Institutional Investors Pivoting to Quants” - London, UK (November 2016)

Speaker at the Global Fund Forum 2016 - Southampton, Bermuda (October 2016)

Speaker on Investor PanelJudge in “Deal Ring of Emerging Managers”Speaker at the University of Alberta on “What Graduates Need to Know About The Canadian Hedge Fund Industry” - Edmonton, Canada (October 2016)

Moderator at Sigma Research: Dinner & Discussion on a variety of industry-related hedge fund and alternative beta issues - Montreal, Canada (October 2016)

Speaker at AIMA Canada Investor Forum 2016 - Montreal, Canada (October 2016):

> Emceed Investor Track Moderator on “Due Diligence – The Interplay Between Operational and Investment Due Diligence”
>
> Panelist on “Alignment of Interest between Investors and Hedge Funds”

Speaker at the University of Ottawa on “What Graduates Need to Know About The Canadian Hedge Fund Industry” - Ottawa, Canada (September 2016)

Speaker at AIMA Canada Educational Luncheon on “Investing in Alternatives and Hedge Funds” - Ottawa, Canada (September 2016)

Speaker at AIMA Singapore Forum 2016 on “Does the Hedge Fund Industry Need Re-tooling?” - Singapore, Singapore (September 2016)

Speaker on Fee Structures: From Private Equity to Hedge Funds at GAIM Ops Conference - Amsterdam, The Netherlands (June 2016)

Speaker at IPM Global Macro Conference on “Macro is Dead, Long Live Macro: Challenges and Opportunities of Macro Investing, Insights From Key Allocators” - Sandham, Sweden (June 2016)

Moderator at Sigma Research Seminar on “Operational Due Diligence, Governance, and Structural Alpha” - Toronto, Canada (June 2016)

Guest at University of Toronto’s “An Evening to Celebrate Manjul Bhargava” - Toronto, Canada (June 2016)

Speaker at the Canadian High Commission on the Canadian Alternative Investment Industry as part of the AIMA Canada Delegation - London, UK (June 2016)

Panelist at New York University’s Big Data Finance Conference on “Big Data, Markets, & Volatility” - New York, US (May 2016)

Moderator at Richardson GMP Alternative Investments Conference on "CTAs and Their Benefits" - Toronto, Canada (May 2016)

Panelist at Goldman Sachs Prime Brokerage Eleventh Annual Asian Hedge Fund Leaders Conference on "Trends in Operational Due Diligence" - Hong Kong, China (May 2016)

Guest to Morgan Stanley Innovative Research Conference - Ojai Valley, California (April 2016)

Moderator at Sigma Investor Round-Table Discussions Co- Hosted by Wharton School, Sigma Analysis & Management, and Ada Investments on "The Future of Factor Investing" - Toronto and Montreal, Canada (March 2016)

Speaker at the University of Hawaii: Department of Mathematics Seminar for Undergraduates / Graduates Students on "Some Musings of a Mathematician About The Hedge Fund Space." Honolulu, Hawaii (March 2016)

Speaker - Toronto, Canada (February 2016):

> Speaker on "Alignment of Interests – What Do Allocators Really Want?
>
> Speaker on "Distribution and Development of New Products: Packaging Alpha into Different Boxes"

Speaker at HFM Operational Leaders' Summit on "Reputation Risk: Strategies to Help You Sleep at Night" and "Mitigating Portfolio Risk – The Modernization of Diligence for Alternative Investments" - New York, US (February 2016)

Panelist at University of Ottawa's International Development Week's Conference on "Beyond Addis Ababa: Innovations in Development Finance" – Ottawa, Canada (February 2016)

Moderator at University of Toronto's MMF Symposium on "Asset Allocation and Hedge Funds: A Global Perspective" - Blue Mountains, Canada (February 2016)

Panelist at MFA Miami Network on "Trading Volatility" - Miami, US (January 2016)

2015

Speaker at the University of Alberta on "What Graduates Need to Know About the Canadian Hedge Fund Industry" - Edmonton, Canada (November 2015)

Part of the AIMA Canada Delegation - Tokyo, Hong Kong, and Singapore (November 2015)

Moderator at the Battle of the Quants London on "What's Behind the Recent Performance Divergence in Systematic CTA's" - London, UK (October 2015)

Speaker about the Hedge Fund Industries in Canada and Chicago as part of an AIMA Canada Delegation, Chicago, IL (October 2015)

Moderator at the Canadian Annual Derivatives Conference on "Investing in Hedge Funds – A Global Perspective" - Quebec City, Canada (October 2015)

Moderator at the AIMA Canada Hedge Fund Conference on "Partnerships and Structuring" - Toronto, Canada (October 2015)

Moderator at CME Investor Dinner on "The Role of CTA Allocation in Volatility Equity Markets" - Toronto, Canada (October 2015)

Moderator at CME Investor Luncheon on "The Role of CTA Allocation in Volatility Equity Markets" - Montreal, Canada (October 2015)

Speaker at the New York Finance Forum on "Financial Investment in the World Under Reconstruction" - New York, US (September 2015)

Speaker at the RJ Oasis Webinar Series on "Portfolio Construction using Managed Futures" - (September 2015)

Speaker at the CME Group Managed Futures Investor Roundtable on “Constructing and Optimizing Portfolios with Managed Futures Allocations” - Chicago, US (June 2015)

Speaker at AIMA Canada Annual Debate 2015 on "Hedge Fund Risk Communication" - Toronto, Canada (June 2015)

Delegate at the 2015 Napa Valley Alternative Edge Forum (SocGen) - Napa Valley, California (May 2015)

Speaker at the 2015 Battle of the Quants – NYC Education Day on "How to Conduct Due Diligence on Systematic Hedge Funds" - New York, US (May 2015)

Delegate to the Morgan Stanley Innovative Research Conference - Ojai, US (April 2015)

Panelist at the University of Toronto MMF Summit on "Algorithmic Trading" - Blue Mountains, Canada (February 2015)

Co-lectured seminar at the University of Ottawa: The School of International Development and Global Studies and the Telfer School of Management on "Hedge Fund Investing in Emerging Markets" - Ottawa, Canada (February 2015)

2014

Co-moderator at CME Investors Roundtable Dinner - Toronto, Canada (November 2014)

Speaker at the Montréal Exchange's Canadian Annual Derivatives Conference on "Meet the Investors and Managers" - Quebec City, Canada (November 2014)

Delegate at the AIMA Canada Delegation - London, UK and Dubai, UAE (October 2014)

Speaker at the California State University Dominguez Hills: Mathematics Colloquium on “Some Musings of a Mathematician About The Hedge Fund Space" - Carson, US (October 2014)

Speaker at AIMA Canada's HEDGE on "Hedge Fund Industry" - Toronto, Canada (August 2014)

Speaker at Battle of the Quants Shanghai - Shanghai, China (June 2014):

How to Conduct Due Diligence on Hedge Funds

The Value of Liquidity Applied to Quantitative Hedge Funds

2013

Speaker at Montréal Exchange's Canadian Annual Derivatives Conference on "Meet the Managers" - Mont Tremblant, Canada (December 2013)

Speaker at the CME Group on "Tail Risk, Liquidity, Alternative Betas, and Risk Premia" – Toronto, Canada and Montreal, Canada (October 2013

Speaker at the Battle of the Quants London on “Investing in Quantitative Hedge Fund Strategies – Why and Which Strategies” - London, UK (June 2013)

Speaker at CME Canadian Investor Series – “Why Managed Futures Should Be Included in an Institutional Portfolio” - Edmonton, Canada (June 2013)

Guest Lecturer at DePaul University: Kellstadt Graduate School of Business on "Due Diligence of Managed Futures" - Chicago, US (May 2013)

Speaker at the Battle of the Quants New York on the “Mathematics of Liquidity” - New York, US (April 2013)

Speaker at the CFA Society Chicago Education Conference 2013 – Rethink Financial Theories and Models, on Alternative Investments, Chicago, IL. (March 2013)

2012

Speaker at the Canadian Annual Derivatives Conference 2012, hosted by the Montréal Exchange on Meet the Chief Investment Officers, Québec City, Canada (November 2012)

Speaker at The Culture and Career Club's Career Seminar: Insights into Asset Management - Chicago, US (November 2012)

Speaker at PRMIA's Inaugural Canadian Risk Conference on “Counter-Party Risk of FCMs” - Montreal Canada (November 2012)

Speaker at the CIBC (Alt)2 - 2nd Annual Alternative Investment Forum on Incubators: The Merits of Investing in Emerging Markets - Toronto, Canada (October 2012)

Speaker at The Goodman Institute Fall Speaker Series (The CFA Institute (Montreal chapter) and Concordia University John Molson School of Business) on “Market Volatility – it’s still an Issue”, Montreal, Canada (September 2012)

Speaker at CME Group's Campbell & Company Seminar on “Managed Futures – From the Trading Floor to Your Portfolio - Chicago, US (September 2012)

Speaker at the Battle of the Quants London on “In Search of Yield: Finding yield in a low-yield environment”, London, UK (September 2012)

Speaker at the Calgary Petroleum Club – Alternative Investing in Canada - Calgary, Canada (May 2012)

Speaker at the 2012 Investment News Retirement Income Summit on “Three Ways to Find Income in a Low-Yield World”, Chicago, Illinois (April - May 2012)

Speaker at the 2nd Canadian Alternative Investment Forum on “Managed Futures in an Institutional Portfolio”, Toronto, Canada (April 2012)

Speaker at the Battle of the Quants New York on the “Quantitative Investor Panel: The Other side of Alpha!” New York, NY (March 2012)

Speaker at the Hedge Fund Managed Accounts 2012 on “The Move to Real-Time Daily Pricing” London, UK (March 2012)

Speaker at UCITS for Hedge, Mutual & Investment Fund Managers: Distribution & Asset Raising Opportunities in Europe on “Global Distribution – Connecting UCITS with the Professional Investor”, New York, NY (February 2012)

Invited Speaker in the Hedge Fund Association West Coast Chapter Market & Operational Risks in 2012 on “Operational Due Diligence War Stories”, Los Angeles, California (February 2012)

2011

Speaker at the Battle of the Quants - Hong Kong, Hong Kong (December 2011)

Speaker on "Systematic Models Issue of the Day: Would You Ever Override Your Trading System?"

Speaker on "Investing in Quant Strategies: UCITS, Managed Accounts or Direct – Pros and Cons"

Speaker at the 2nd Annual Latin America Grain and Oilseed Conference on “Hedge Fund Perspective on Commodity Futures” - Panama City, Panama (December 2011)

Speaker at Canadian Annual Derivatives Conference - Quebec City, Canada (November 2011):

Featured Speaker on "The Benefits of Managed Futures in Volatile Markets"

Moderator on "Meet the Allocators"Moderator on "Meet the Managers"

Featured Speaker at DePaul University Kellstadt Graduate School of Business on Due Diligence of Managed Futures, Chicago, Illinois (November 2011)

Speaker at Deloitte Second Annual Hedge Fund Symposium, (Panel) Evaluating Your Business Strategy Across the Life Cycle of a Hedge Fund, Chicago, Illinois (October 2011)

Speaker at Alternative Investment Fund Roundtable on “Shaggy, Hotel California, and other Nuggets of Wisdom in Alternative Investments" - Colorado, US (October 2011)

Speaker at the 2nd Annual Hedge PRMIA/AIMA Fund Risk Management Event on “Hedge Fund Risk Management – Nuggets of Wisdom” - Montreal, Canada (September 2011)

Speaker at Emerging Managers Congress for Institutional Investors - Chicago, US (September 2011):

> Speaker on “Asset Allocation Strategies for Profitable Investments”
>
> Speaker on “Benefits of Employing Emerging Managers for Your Plan”Speaker at (Alt)2 – Alternative Investment Forum on “Global Allocators Discuss Alpha and the All-Weather Portfolio” - Toronto, Canada (September 2011)

Featured Speaker at NYU: Stern School of Business on “Hedge Funds Due Diligence” - New York, US (July 2011)

Moderator at CAIA Chicago Chapter on “How Do Managed Futures Fit into an Institutional Portfolio” - Chicago, US (July 2011)

Featured Speaker at PRMIA/CIRANO Risk Management on “Hedge Funds Transparency and Liquidity” - Montreal, Canada (June 2011)

Guest at the Newedge Tuscany Research Forum - Tuscany, Italy (May 2011)

Guest at the GAIM Ops Caymans Conference on “Will SMA Platforms Thrive in The Future?” - Grand Cayman, Cayman Islands (April 2011)

Round-Table Host at GAIM Ops Caymans Luncheon - Grand Cayman, Cayman Islands (April 2011)

Featured Speaker at the University of Hawaii: Schidler School of Business on “Hedge Funds Due Diligence” - Honolulu, Hawaii (April 2011)

Panelist at the Hedge Funds Brazil Forum on “Global Emerging Market Investing” - Rio de Janeiro, Brazil (March 2011)

Speaker at Battle of the Quants on “Investing in Quant Strategies; UCITS, Managed Accounts or Direct – Pros and Cons” - New York, US (February 2011)

Speaker at Emerging Managers Congress for Institutional Investors - Chicago, US (September 2011):

Speaker on “Asset Allocation Strategies for Profitable Investments”

Speaker on “Benefits of Employing Emerging Managers for Your Plan”Speaker at (Alt)2 – Alternative Investment Forum on “Global Allocators Discuss Alpha and the All-Weather Portfolio” - Toronto, Canada (September 2011)

Featured Speaker at NYU: Stern School of Business on “Hedge Funds Due Diligence” - New York, US (July 2011)

Moderator at CAIA Chicago Chapter on “How Do Managed Futures Fit into an Institutional Portfolio” - Chicago, US (July 2011)

Featured Speaker at PRMIA/CIRANO Risk Management on “Hedge Funds Transparency and Liquidity” - Montreal, Canada (June 2011)

Guest at the Newedge Tuscany Research Forum - Tuscany, Italy (May 2011)

Guest at the GAIM Ops Caymans Conference on “Will SMA Platforms Thrive in The Future?” - Grand Cayman, Cayman Islands (April 2011)

Round-Table Host at GAIM Ops Caymans Luncheon - Grand Cayman, Cayman Islands (April 2011)

Featured Speaker at the University of Hawaii: Schidler School of Business on “Hedge Funds Due Diligence” - Honolulu, Hawaii (April 2011)

Panelist at the Hedge Funds Brazil Forum on “Global Emerging Market Investing” - Rio de Janeiro, Brazil (March 2011)

Speaker at Battle of the Quants on “Investing in Quant Strategies; UCITS, Managed Accounts or Direct – Pros and Cons” - New York, US (February 2011)

Moderator at the Institutional Investor Global Real Assets Investment Forum on “Managed Futures: The Answer to Continuing Stock Market Volatility?” - New York, US (February 2011)

2010

Speaker and Moderator at CAIA Chicago Educational on "Demystifying Managed Futures - An Introduction to CTAs and Its Importance in Institutional Portfolios" - Chicago, US (October 2010)

Speaker at the Canadian Annual Derivatives Conference 2010 on “The View on The Canadian Markets from CTAs and Hedge Funds” - Mont Tremblant, Canada (October 2010)

Keynote Speaker at Summit for Alternative Investments on “Investing in Alternatives: Exploring Opportunities” - Chicago, US (October 2010)

Keynote Speaker at University of Hawaii: Shidler College of Business Convocation for the Masters in Financial Engineering on “Governance and Ethics in Finance” - Honolulu, Hawaii (June 2010)

Featured Speaker at CME/Morgan Stanley on “Reducing Left Tail Risk in an Institutional Portfolio Using Managed Futures Strategies” - New York (June 2010)

Speaker at GAIM Ops Asia-Pacific Conference - Hong Kong (May 2010):

> Panelist on “Operational Due Diligence & Best Practices – Quantifying the Due Diligence Process - Achieving Measurable and Qualitative Difference”
>
> Speaker and Round-Table Facilitator on “Understanding the Inter-Connections Between Liquidity, Transparency, and Technology from an Operational Perspective”
>
> Speaker on “Global Keynote Panel – A Global Perspective- Managing a Dynamic and Efficient Operational Structure When Dealing with Multiple and Varying Operational Processes and Regulatory Regimes”
>
> Panelist on “Do The Benefits of New Structured Products Outweigh the Cost of Implementing the Operational and Transparency Controls to Support Them?”

Speaker at CME Group: Pension Investment Association of Canada - Chicago, US (May 2010)

Panelist at the Hedge Fund Managed Accounts on “Manager Selection: Pinpointing the Key Criteria Behind Selection Decisions” - London, UK (April 2010)

Panelist at the CME Group Event on “The Role of Managed Futures in the Multi-Strategy Portfolio: Excelling During Market Turmoil” - Boston, US (March 2010)

Panelist at the GAIM Ops Cayman on “Balancing Liquidity and Performance – Increasing Liquidity Without Reducing Fund Performance” - Grand Cayman, Cayman Islands (February 2010)

Panelist at Battle of the Quants on “Quantitative Systematic Managed Futures Trading Managed Accounts – Pros and Cons” - New York, US (January 2010)

Panelist at Opalesque Square Interactive Event on “Premiums Associated with Liquid Asset vs. Illiquidity Related Return Premiums” (January 2010)

2009

Speaker at National University of Singapore: Institute of Mathematical Sciences and the Risk Management Institute Financial Mathematics Symposium on “Liquidity Matters – Pure & Applied Techniques in Liquidity Management” - Singapore, Singapore (December 2009)

Speaker at National University of Singapore: by Institute of Mathematical Sciences and the Risk Management Institute Workshop on “Optimal Stopping and Singular Stochastic Control Problems in Finance - Singapore, Singapore (December 2009)

Speaker at the Canadian Annual Derivatives Conference on “Different Hedge Fund Trading Strategies” - Mont Tremblant, Canada (October 2009)

Speaker at the National Club of Canada’s Toronto CFA Society Luncheon on “Managed Accounts & Managed Futures” - Toronto, Canada (October 2009)

Speaker at Chinese National Futures Association & CME on “Different Trading Strategies of Managed Futures” - Taipei, Taiwan (October 2009)

Speaker at Due Diligence of Fund of Funds and Hedge Funds - London, UK (September 2009)

Featured Courant Institute of Mathematical Sciences: Speaker at Financial Mathematics Seminar on “Due Diligence Techniques & Managed Accounts” - New York, US (June 2009)

Speaker at the IMCA (International Management Consultants Association) Spring Professional Development Conference on “Managed Futures” - San Diego, US (May 2009)

Panelist at the GAIM Ops Conference on “Operational Due Diligence and Risk Reduction” - Grand Cayman, Cayman Islands (April 2009)

Speaker at Hedge Funds World - the Middle East on “The Benefit of Managed Futures in Institutional Portfolios” - Dubai, UAE (March 2009)

Featured Speaker at the University of Chicago’s Financial Mathematics Seminar on “The Mathematics of Liquidity - Chicago, US (January 2009)

Featured Speaker at Financial Mathematics Seminar at the Courant Institute of Mathematical Sciences on “The Mathematics of Liquidity” - New York, US (January 2009)

2008

Speaker at the Hedge Fund Risk Management Conference on “Measuring Hedge Fund Risk” - New York, US (November 2008)

Speaker at Chicago Mercantile Exchange: Global Arc Conference on “Managed Futures” - Boston, US (October 2008)

Speaker at the Canadian Annual Derivatives Conference on “Algorithmic Trading and Current Economic Landscape” - Mont Tremblant, Canada (October 2008)

Featured Speaker at Newedge Seminar Series on “Liquidity Topics” - Chicago, US (October 2008)

Speaker at Alternatives Conference on “Liquid Alpha Strategies and Short-Term Trading at Family Office & Wealth Preservation – Diversification” - Geneva, Switzerland (October 2008)

Speaker at Alternatives Conference on “Liquid Alpha Strategies and Short-Term Trading at Family Office & Wealth Preservation – Diversification” - Geneva, Switzerland (October 2008)

Featured Speaker at the National Club of Canada: Toronto CFA Society Luncheon on “Liquidity Matters” - Toronto, Canada (June 2008)

Speaker at Hedge Funds 101 & 102 Conference on “Quantitative Trading Strategies” - San Francisco, US (June 2008)

Keynote Speaker at the Numerical Methods for Finance Conference - Dublin, Ireland (June 2008)

Speaker at New York University: Courant Institute of Mathematical Sciences on “Mathematical Finance Techniques” - New York, US (May 2008)

Guest at the Newedge Bordeaux Research Forum - Bordeaux, France (May 2008)

2007

Speaker at Hedge Royale on "Liquidity and Chair of Plenary Session on Thought Leaders in Commodities and Energy" - London, UK (November 2007)

Speaker at World Tourism Marketing Summit on “Portfolio Management, Diversification of Assets, and Risk Management” - Beijing, China (October 2007)

Speaker at 2007 Canadian Annual Derivatives Conference on "The Value of Liquidity" - Montreal, Canada (September 2007)

Speaker at Hedge Funds Styles & Strategies Conference on "Convertible Arbitrage Hedge Funds" - New York, US (September 2007)

Speaker at Hedge Funds 101 & 102 Conference - Chicago, US (July 2007)

Speaker on "Convertible Arbitrage Strategy, Market-Neutral Equity Strategy"

Speaker on "The Risk and Return Characteristics of Hedge Funds"

Speaker at Hedge Fund Trading Strategies Forum on “Out of the Lab and into the Real World: Assessing Trading Risk” - New York, US (July 2007)

Speaker at Courant Institute of Mathematical Sciences' Graduate Course on "Applying Omega Function to Portfolio Management" - New York, US (May 2007)

Speaker at Alternative Investments 101 & 102 Two-Day Workshop - New York, US (January and February 2007)

Speaker on "Risk Management in the Alternative Investments Industry"

Speaker on "Trading Strategies and Future of Hedge Funds"

2006

Speaker at Hawaii Pacific University's Graduate Finance Course on "Liquidity at Advanced Derivatives" - Honolulu, US (November 2006)

Speaker at HEDGE2006 on "Energy Hedge Funds" - London, UK (October 2006)Speaker at Canadian Annual Derivatives Conference on "Hedge Funds Due Diligence Panel" - Toronto, Canada (September 2006)Speaker at Investing in Hedge Fund Credit Strategies Conference on "Credit Default Swaps" - New York, US (September 2006)

Speaker at Hedge Funds Analytics Conference on "Risk Management" - New York, US (June 2006)

Speaker at MITACS (Mathematics of Information Technology & Complex Systems) on "Modeling Trading & Risk in the Markets" - Hamilton, Canada (November 2005)

Speaker at QWAFAFEW (Quantitative Work Alliance for Applied Finance, Education, & Wisdom) on "Extreme Risk and Portfolio Management" - Toronto, Canada (October 2005)

Speaker at Canadian Annual Derivatives Conference on "Risk Management" - Quebec, Canada (August 2005)

2004

Speaker at American Mathematical Society on "Omega Function and Mathematics in the Hedge Funds Arena" - Phoenix, US (January 2004)