



**INVESTMENT
ADVISOR
EXCHANGE**

AGENDA
IN-PERSON EVENT



Fidelity Investments
245 Summer Street
Boston, MA 02210

Fidelity[®]

MONDAY MARCH 23, 2026

6:00 p.m. Dinner arranged by your Fidelity representative

TUESDAY, MARCH 24, 2026

8:30 a.m. Registration and light breakfast

9:00 a.m. **Positioning for 2026: Sector and factor trends**
Denise Chisholm, *Director of Quantitative Market Strategy*

9:30 a.m. **Small stocks, big opportunities: A micro-cap outlook**
Salim Hart, *Portfolio Manager*

10:00 a.m. **Beyond the curve: What's next for fixed income?**
Christine Thorpe, *Institutional Portfolio Manager*

10:30 a.m. **BREAK**

10:40 a.m. **FCAT/Trading floor tours/Fidelity Portfolio Solutions**

12:05 p.m. **LUNCH**

12:50 p.m. **Global innovation: Themes driving the next wave of growth**
Evan Zehnal, *Research Analyst and Assistant Portfolio Manager*

1:20 p.m. **Equity Premium Yield: Turning income into opportunity**
Eric Granat, *Portfolio Manager and Derivatives Analyst*
Brendan Sims, *Alternative Strategist*

1:50 p.m. **Rethinking equity income: Strategies for today's market**
Bobby Barnes, *Head of Quant Index Solutions*
Étienne Joncas Bouchard, *Director, ETF and Alternatives Strategy*

2:20 p.m. **Global macro outlook: Navigating a transforming market**
Jurrien Timmer, *Director of Global Macro*

2:50 p.m. **Closing remarks**