







CLIENT AGENDA AND SPEAKERS

Thursday, January 29, 2026

Time	Agenda	
8:30 a.m.–9:00 a.m. ET	Registration and light breakfast Vantage Venues - St. Andrew's Hall 150 King St. West, 27th Floor Toronto, ON M5H 1J9	
9:00 a.m.–9:45 a.m. ET	Taking advantage of positive change Mark Schmehl, Portfolio Manager	
9:45 a.m.–10:20 a.m. ET	Sector watch: Market trends that matter Denise Chisholm, Director of Quantitative Market Strategy	
10:20 a.m.–10:30 a.m. ET	Break	
10:30 a.m.–11:05 a.m. ET	Opportunities in international equities Jed Weiss, Portfolio Manager	
11:05 a.m.–11:40 a.m. ET	Growth investing in U.S. equities Michael Hickey, Institutional Portfolio Manager	
11:40 a.m.–12:10 p.m. ET	A CIO perspective and market outlook Andrew Marchese, Chief Investment Officer and Portfolio Manager	
12:10 p.m.–12:20 p.m. ET	Fidelity Portfolio Intelligence: Inside the engine Paul Aulicino, Portfolio Strategist	
12:20 p.m.–1:05 p.m. ET	Lunch	

Time	Agenda	
1:05 p.m.–1:40 p.m. ET	Staying resilient in turbulent markets Daniel Dupont, Portfolio Manager	
1:40 p.m.–2:15 p.m. ET	Capturing alternative returns from long-short equity David Way, Portfolio Manager Brendan Sims, Alternative Strategist	 
2:15 p.m.–2:45 p.m. ET	ETF Insights: An all-in-one approach to portfolio construction Étienne Joncas Bouchard, Director, ETF and Alternatives Strategy	
2:45 p.m.–2:50 p.m. ET	Closing remarks	