



CONFERENCE AGENDA

8:00 - 8:10 **WELCOME**

- **Eric Jaffe**, BCA Research CEO

8:10 - 9:15 **SESSION 1**

Macro Panel: The Bull vs. Bear Debate

- **Peter Berezin**, BCA Chief Global Strategist
- **Francois Trahan**, President and Founding Partner of The Macro Institute
- **Anna Wong**, Chief US Economist for Bloomberg Economics
- **Martin Barnes**, Former Chief Economist, BCA Research, **Moderator**

9:15 - 10:30 **SESSION 2**

Tech Panel: Innovation Beyond AI

- **Jocelyn Doe**, General Partner at Builders VC
- **Josh Wolfe**, Co-Founder Lux Capital
- **Peter Levin**, Managing Director and Co-Founder at Griffin
- **Charlie Tafoya**, CEO and Co-Founder, Chronograph
- **Marko Papic**, BCA Chief GeoMacro Strategist, **Moderator**

10:30 - 10:50 **BREAK**

10:50 - 11:35 **SESSION 3**

How To Be An Institutional Investor In The Roaring Twenties And Beyond

- **Zach Schreiber**, Co-Founder PointState Capital in a conversation with **Paula Volent**, Vice President and Chief Investment Officer at The Rockefeller University

11:35 - 12:20 **SESSION 4**

Unloved Trade Ideas: How To Invest In Hated Assets

- **Karen Harris**, Managing Director of Bain & Company's Macro Trends Group
- **Jitania Kandhari**, Deputy CIO of the Solutions & Multi-Asset Group and Portfolio Manager for Passport Equity Strategies, Morgan Stanley
- **Arthur Budaghyan**, BCA Chief EM/China Strategist
- **Anastasios Avgeriou**, Chief Strategist for Bienville Capital
- **Garry Evans**, BCA Head of Research Solutions, **Moderator**

12:20 - 1:45 **LUNCH SESSION**

The Future of Crypto: Bitcoin, Stablecoins, And Why We Are Taking It Seriously This Time

- **Adam Winnick**, Founder of Finality Capital Partners
- **Alec Lovett**, Head of Stablecoins & Payments, Coinbase
- **Eleanor Terrett**, Journalist and Co-Host of the Crypto In America Podcast, **Moderator**

1:45 - 2:45 **SESSION 5: KEYNOTE**

A Fireside Chat On US Economic Priorities

- **Pierre Yared**, Acting Chairman and Member of the Council of Economic Advisers
- **Marko Papic**, BCA Chief GeoMacro Strategist, **Moderator**

2:45 - 3:30 **SESSION 6**

Geopolitics: The World Is Not Ending. Your World Is Ending.

- **Marko Papic**, BCA Chief GeoMacro Strategist

3:30 - 3:45 **BREAK**

3:45 - 4:50 **CLOSING SESSION**

Trade and Investment Ideas from BCA Strategists