

Wed 29.

18:30 - 22:00

Opening Dinner

Venue to be determined.

Thu 30.

08:00 - 09:00

Networking Breakfast at BMV.

Bolsa Mexicana de Valores - BMV

08:00 - 17:30

ETF Donostia / LatAm Connection. LatAm meets ETF Donostia International for a full day of discussions.

Discussions on ETF global trends, overview of the macro climate for business in Mexico, how US institutional investors are using ETFs and the latest from around the worlds of crypto and blockchain including the new US bitcoin ETFs.

08:00 - 09:00

Breakfast and Networking.

Breakfast session at BMV.

09:00 - 09:15

Welcome and introduction/Bienvenido.

Benito Baez, Reggie Browne and Jim Wiandt.

09:15 - 10:00

Crypto Goes Mainstream: An Inside Look at the Historic Bitcoin ETFs Launch.

Potential Moderator and Speakers: Matt Hougan, Jay Jacobs, Ben Slavin, Dave LaValle, Dave Abner, Steve Cohen.

10:00 - 10:30

Around The (ETF) World in Half an Hour: Key Perspectives on Global ETF Markets - updates on listings and trading trends, regulation, growing markets. US and Europe with some Asia focus.

Possible Moderator and Speakers: Reggie Browne with Tyler Mordy, Steffen Scheuble, Deb Fuhr, Rahul Sen Sharma.

10:30 - 11:00

Coffee and Connect

[30 minutes of networking.]

11:00 - 11:30

A LATAM Markets Deep Dive Part 1: Understanding how LatAm markets work and how local regulation is shifting.

Possible Moderator and Speakers: Dave Garff with Benito Baez, Daniel Gamba, Rodrigo Blancas [Head of Equities, Citi Pension Fund], +other local representatives.

11:30 - 12:15

How AI will Reinvent the Way Investing Works. A new vision for the future of investment involving hyper customization and processing limitless data.

Possible Moderator and Speakers: Jim Wiandt or Dave Abner with Jonty Hurwitz, Mike Venuto, Vinay Nair, Bryan Lake.

12:15 - 12:45

Mexico is Booming and Open for Business: Overview of the Macro Climate for Business in Mexico (and across Latin America).

Possible Moderator and Speakers: Jessica Roldan [Head of Macro Research Finamex] and others TBD.

12:45 - 13:45

Lunch.

Lunch at BMV.

13:45 - 14:30

LATAM Deep Dive Part 2: Understanding Asset Owner Challenges & Needs

Panel w Asset Owners or Mixed panel of Asset Owners w Asset Managers followed by Q&A.

14:30 - 16:00

Exchanging Views: Global ETF Leaders meet Local MARKET - INVESTORS AND ECOSYSTEM.

Group splits into breakout rooms to enable more intimate round table discussions on a selection of topics.

16:00 - 16:30

Coffee & Connect

Coffee & Connect

16:30 - 17:00

Reimagining Risk: How Global Asset Owners are Reimagining Investment .

Possible Moderator/Speakers: TBD.

17:00 - 17:30

Keynote Speaker.

Speaker TBD.

17:03 - 20:00

Networking Reception.

Details to be confirmed.

17:30 - 20:00

Evening reception and networking.

Evening reception and networking at BMV.

Fri 31.

07:30 - 08:30

Breakfast and hellos.

At the event venue.

08:30 - 08:45

Welcome, ground rules and introductions.

With Jim Wiandt and others.

08:45 - 09:15

Who's Who.

In 30 seconds - who you are, what you do, what you want from the gathering.

09:15 - 09:45

Setting the Tone: Big Issues for 2024 and Beyond.

Potential Firestarters: Reggie Browne, Fiona Bassett, Laura Morrison and Dave Lavallo.

09:45 - 10:30

Macro session on Geopolitics, Interest Rates & Economic Outlook.

Potential Firestarters: Tyler Mordy, Meb Faber, and / or a local economist

10:30 - 11:15

Inside the SEC Spot Bitcoin Saga: What's Next? What does it mean for the rest of the world?

Potential Firestarters: Dave Lavalley, Ophelia Snyder, Tom Staudt, Matt Hougan, Ben Slavin. Jay Jacobs, Steve Cohen, Dave Abner.

11:15 - 12:00

Ticker ROGN - Sales Roadmap of the Future?

Joe Rogan has mainstream media against the ropes. Rogan symbolizes a seismic shift. As celebrity has entered politics and marketing has begun to make its way into investment, should the way we build and market products reflect this?

12:00 - 12:30

Living Longer and Better.

A Palate cleanser on Longevity with Som Seif, Tyler Mordy and Steve Cohen.

12:30 - 14:00

Lunch.

At Sofitel.

14:00 - 14:30

Topic TBD.

More details shortly.

14:30 - 15:00

10 Questions in 30 Minutes: Disruption.

More details soon.

15:00 - 15:30

Are we Hallucinating or is the AI Revolution Real?

AI technology is bringing revolutions in efficiency, scale and service to our industry at supersonic speed. Are our businesses leading, keeping up or catching up? Potential Firestarters: Bryon Lake, Vinay Nair, Steve Cohen, Som Seif, Ben Slavin.

15:30 - 16:30

Afternoon Coffee Break and Networking and Introducing ETF Donostia Marketplace - connecting problems with solutions.

More details soon.

16:30 - 17:30

Hyper Customization - Key to the Retail Kingdom?

Can the advance of AI be leveraged to hyper-customize engagement with our communities building better bonds downstream? How is that taking shape in our industry today? Potential Firestarters: Jonty Hurwitz/Deb Yang, Vinay Nair, Mike Venuto, Phil Bak.

18:30 - 22:30

Reception and Dinner.

More details soon.

Sat 1.

08:00 - 09:00

Breakfast.

At event venue.

09:00 - 13:00

Half day of sessions.

Session details coming soon.

09:00 - 09:45

Back to the Future for ETFs.

Starting with your vision for the future of ETFs you will reverse engineer what it takes to get there. This “team workshop” pits the OGs v Newbies looking at the future of ETFs from 2 perspectives and how those visions align or differ.

09:45 - 10:30

Demographic Shift - Investment Opportunities in Emerging Markets.

The demographic shift towards a younger, growing population in Asia and Africa is ushering in new opportunities. What does this mean for our industry? Potential Firestarters: Kevin Carter, others TBD.

10:30 - 11:00

Topic TBD.

More details soon.

10:30 - 11:15

The Power of Community: What is the ETF Community Doing Right and What Can We Do Better?

Potential Firestarters: Ben Slavin, Peter McKillop, Fiona Bassett, Reggie Browne.

11:15 - 12:00

Active ETFs Come of Age.

In 2023 Mutual Funds opening to an ETF structure led to the conversion of over \$100 billion in assets, many of them active. Are the floodgates about to open? Potential Firestarters: Bryon Lake, others TBD.

12:00 - 12:30

Engaging the Advisor: How to get in front of advisors - Pain points, What's working, lessons learned.

Potential Firestarters: TBD.

12:30 - 13:00

ETF Donostia Grab Bag Topic

As a group, we will decide what topic to focus on and assemble an instant panel to debate, discuss, and analyze it. Speakers and moderators will be determined on site. Potential Firestarters: Open

14:30 - 17:30

Lunch and group networking activities.

Lunch and afternoon activities in CDMX.

18:30 - 22:00

Closing reception and Concert: Instituto Mexicano del Sonido.

Dinner with Live Music.
