

Wed 29.

18:30 - 22:00

Opening Dinner

Venue to be determined.

Thu 30.

08:00 - 17:30

ETF Donostia / LatAm Connection. LatAm meets ETF Donostia International - Supported by our partners Jane Street, Finamex and Vanguard.

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 on the 15th Floor at BMV.

09:00 - 09:15

Welcome and introduction/Bienvenido.

Benito Baez, Reggie Browne, Linda Zhang and Jim Wiandt.

09:15 - 10:00

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

Possible Moderator and Speakers: Jim Wiandt with Steve Cohen, John Hyland Tom Staudt.

10:00 - 10:45

Challenges and Opportunities in ETFs for 2024: Key Perspectives on Global ETF Markets

We'll set the table for the event and discuss the latest developments in international markets, technology, distribution and product innovation. Possible Moderator: Reggie Browne with Vicente Cabrera, Rahul Sen Sharma, Kelsey Mowrey and Will Rhind.

10:45 - 11:15

Coffee and Connect

30 minutes of networking.

11:15 - 12:00

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

Moderator and Speakers: Dave Garff with Benito Baez, Daniel Gamba, Juan Hernandez.

12:00 - 12:30

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].

12:30 - 14:00

Lunch.

Lunch at BMV.

14:00 - 14:45

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

Moderator: Ugo Egbunike Speakers: Mayte Rico [CIO HSBC Funds], Luis Gonzali [Co-Director de Inversiones Franklin Templeton], Almudena Ruiz [Finamex].

14:45 - 15:30

How AI will Reinvent the Way Investing Works. Case studies in how issuers and investors are using AI in their businesses now.

Possible Moderator: Dave Abner with Deb Yang and Sharon French.

15:30 - 16:00

Coffee & Connect

30 Minutes of Networking.

16:00 - 16:45

Reimagining Risk: How Global Asset Owners are Reimagining Risk.

Speaker: Jon Lukomnik.

16:45 - 17:30

Keynote Speaker. Senator Roberto Moya

Speaker: Senator Roberto Moya is a member of the National Action Party and previously served as the Secretary of Finance and Administration for the state of Puebla.

17:30 - 20:00

Evening reception and networking.

Evening reception and networking at BMV.

Fri 31.

08:00 - 09:00

Breakfast and hellos.

At Sofitel.

09:00 - 09:15

Welcome, ground rules and introductions.

With Jim Wiandt.

09:15 - 09:30

Who's Who.

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

09:30 - 10:30

Setting the Table for 2025: We'll set the tone for our two days together by discussing the big topics in the ETF and index industry globally this year and beyond.

Each firestarter will take a couple minutes to frame what they see as the biggest challenges and opportunities in the industry and then we'll open the discussion to all. Possible Firestarters: Reggie Browne with Jay Jacobs, Will Rhind and Sharon French.

10:30 - 11:15

Understanding Lat Am Markets: An open discussion on what has worked in LatAm markets and how the investment landscape is evolving

Potential Firestarters: Ugo Egbunike, Daniel Gamba, David Garff.

11:15 - 11:45

Coffee & Connect.

Networking.

11:45 - 12:30

Standing Out - How do innovative issuers Connect with New Investors?

We take a look at the latest in customized communication, building investor communities & direct to retail strategies, examining the future of product distribution & marketing. With: Jonty Hurwitz, John Hyland, Kelsey Mowrey, Will Rhind and Tom Staudt.

12:30 - 14:00

Lunch.

At Sofitel - adjacent to the meeting room.

14:00 - 15:00

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: Linda Zhang, Deb Yang, Tyler Mordy.

15:00 - 15:15

10 Questions in 15 Minutes: From Disruptor to Establishment.

We introduce Jay Jacobs from Blackrock to the group with an introductory Q&A covering his background and perspective.

15:15 - 16:30

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

More details soon.

16:30 - 17:30

Afternoon Dose of Clarity with Aaron Turner

Aaron Turner from One Thought is back to highlight the often hidden affects of our state of mind, the less obvious results of the state of mind we work in. Do we pay a price for it or turn it into a dividend?

18:30 - 22:30

Reception and Dinner.

Transport departing the Motor Lobby of Sofitel at 18:00.

Sat 1.

08:00 - 09:00

Breakfast.

At event venue.

09:00 - 09:10

Overview of Day 1

Quick overview of Day 1 and setup for the logistics of day 2 and activities as well as Sunday.

09:10 - 10:00

Inside the SEC Spot Bitcoin Saga and What's Next: Where will the market go going forward in terms of product innovation and expanded usage of blockchain technology.

Potential Firestarters: Steve Cohen, Tom Staudt, Damon Walvoord.

10:00 - 10:30

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

Potential Firestarters: Kelsey Mowrey, Ugo Egbunike, Phil Bak

10:30 - 11:00

Coffee & Connect

Morning networking break.

11:00 - 12:00

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

12:00 - 13:00

Wrap-up & Review.

Wrap-up. Review of event and next steps, logistics for the rest of the event and wrap up and discussion of 2025.

13:00 - 17:00

Lunch and group networking activities.

Lunch and afternoon activities in CDMX.

18:30 - 22:00

Closing reception and Concert: Instituto Mexicano del Sonido.

Transport departing from Sofitel Motor Lobby at 18:00.
