The Journal of Performance Measurement®

Twenty-third Annual
International Performance Measurement, Attribution & Risk Conference (PMAR™)

AGENDA DAY ONE: WEDNESDAY, MAY 21, 2025	
8:00 AM – 8:45 AM	REGISTRATION & CONTINENTAL BREAKFAST
8:45 AM – 9:00 AM	**WELCOME** David Spaulding, DPS, CIPM, TSG
9:00 AM – 10:00 AM	**PERFORMANCE ANALYTICS TECHNOLOGY & PRESENTING PERFORMANCE** Ian Thompson, Ph.D., BNY; Alex Shafran, Cohen & Steers; and Shankar Venkatraman, CFA, FRM, American Century Investments
10:00 AM – 10:40 AM	**DIETZ AWARD WINNER: A DECISION-BASED APPROACH TO RISK-ADJUSTED PERFORMANCE ATTRIBUTION** Luke Petrus, Ortec Finance
10:40 AM – 11:10 AM	MORNING BREAK
11:10 AM – 12:00 PM	**INVESTING IN A GLOBAL ECONOMY IN 2025** John Longo, Ph.D., Rutgers Business School
12:00 PM – 1:00 AM	LUNCH
1:00 PM – 1:30 PM	**HANDLING BENCHMARK MISFIT** Stephen Campisi, CFA, The Pensar Group and Debi Rossi, Kyza Performance Consulting
1:30 PM – 2:00 PM	**DEVELOPING STAFF FOR SUCCESS** Frances Barney, CFA and Jocelyn Gilligan, CFA, CIPM, Longs Peak Advisory Services, LLC
2:00 PM – 2:50 PM	**THE FUTURE OF PERFORMANCE DATA: AUTOMATION, AI, AND ALTERNATIVE ASSET CLASSES** Todd Juillerat, CFA, Damian Handzy, Ph.D., Confluence; and Jose Zayas, Rimes
2:50 PM – 3:15 PM	AFTERNOON BREAK
3:15 PM – 3:53 PM	**CALCULATING LONG/SHORT PORTFOLIOS** John D. Simpson, CIPM, TSG
3:55 PM – 4:35 PM	**PERFORMANCE MEASUREMENT FOR PRIVATE MARKETS AND THE USE OF DERIVATIVES** Dax Johnson, CFA, CIPM, State Street
4:35 PM – 5:00 PM	**PERFORMANCE JEOPARDY**
5:00 PM – 6:00 PM	**NETWORKING & DRINKS RECEPTION**

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AGENDA DAY TWO: THURSDAY, MAY 22, 2025	
8:00 AM – 9:00 AM	**CONTINENTAL BREAKFAST WITH EXHIBITORS**
9:00 AM – 9:10 AM	**WELCOME BACK** David Spaulding, DPS, CIPM, TSG
9:10 AM – 10:00 AM	**AI USE CASES AND BENEFITS FOR PERFORMANCE TEAMS** Jonnathan De Jesus, CFA, Members Trust Company; Mark Elliott, SS&C; Brian Puerschner, First Rate; and John D. Simpson, CFA, CIPM
10:00 AM – 10:50 AM	**THE BOND DISCONNECT: ALIGNING PORTFOLIO REALITY WITH ATTRIBUTION** Stephen Campisi, CFA, The Pensar Group
10:50 AM – 11:10 AM	**MORNING BREAK**
11:10 AM – 12:00 PM	**ADVANCES IN RISK MODELING** Dan diBartolomeo, Northfield
12:00 PM – 1:00 AM	**LUNCH**
1:00 PM – 1:50 PM	**HARNESSING MACHINE LEARNING TO ENHANCE INVESTMENT OPERATIONS** Jose Michaelraj, CIPM, CAIA, Meradia
1:50 PM – 2:30 PM	**SEC MARKETING: HOW THE DIRECTION OF THE NEW ADMINISTRATION WILL IMPACT THE INDUSTRY** Lance Dial, K&L Gates; Thayne Gould, Vigilant; and Matthew Deatherage, CFA, Longs Peak Advisory Services
2:30 PM – 3:00 PM	**PHANTOM ALPHA** David D. Spaulding, DPS, CIPM, TSG
3:00 PM – 3:15 PM	**CONFERENCE CONCLUDES - RAFFLE PRIZES**

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