

# *The Journal of Performance Measurement*<sup>®</sup>

## Twenty-fourth Annual

### International Performance Measurement, Attribution & Risk Conference

#### AGENDA DAY ONE: WEDNESDAY, JUNE 10, 2026

|                            |   |
|----------------------------|---|
| <b>8:00 AM – 8:45 AM</b>   | <b>REGISTRATION &amp; CONTINENTAL BREAKFAST</b>   |
| <b>8:45 AM – 9:00 AM</b>   | <b>WELCOME</b><br>David Spaulding, DPS, CIPM, TSG   |
| <b>9:00 AM – 9:50 AM</b>   | <b>AN OUTLOOK ON THE GLOBAL ECONOMY:<br/>PRACTICAL IMPACTS AND OBSERVATIONS</b><br>John Longo, Ph.D., Rutgers Business School                                 |
| <b>9:55 AM – 10:40 AM</b>  | <b>FIXED INCOME ATTRIBUTION</b><br>Claude Giguere, Robust Technologies  |
| <b>10:40 AM – 11:10 AM</b> | <b>MORNING BREAK</b>  |
| <b>11:10 AM – 12:00 PM</b> | <b>DIETZ AWARD WINNER: EXPLAINING RISK-ADJUSTED<br/>PERFORMANCE USING VECTORS</b><br>Arun Muralidhar, Ph.D., Mcube Investment Technologies, LLC               |
| <b>12:00 PM – 1:00 AM</b>  | <b>LUNCH</b>  |
| <b>1:00 PM – 2:00 PM</b>   | <b>AI, ANXIETY, AND OPPORTUNITY: WHAT<br/>PERFORMANCE PROFESSIONALS NEED TO KNOW</b><br>Alex Serman, CIPM, First Rate; Patrick Trencansky, CIPM, Diamond Hill |
| <b>2:00 PM – 2:50 PM</b>   | <b>COMMON GIPS CHALLENGES AND HOW<br/>TO AVOID THEM</b><br>Ashley Reeves, CIPM, TSG and<br>Matthew Deatherage, CFA, CIPM, Longs Peak Advisory Services        |
| <b>2:50 PM – 3:15 PM</b>   | <b>AFTERNOON BREAK</b>  |
| <b>3:15 PM – 3:55 PM</b>   | <b>PORTFOLIO CONSTRUCTION INSIGHTS:<br/>PERFORMANCE MEASUREMENT OF ACTIVE VS.<br/>PASSIVE MIXES</b><br>Steve Campisi, CFA, The Pensar Group                   |
| <b>3:55 PM – 4:35 PM</b>   | <b>MAKING SENSE OF PUBLIC MARKET EQUIVALENTS:<br/>A PRACTICAL COMPARISON OF APPROACHES</b><br>John D. Simpson, CIPM, TSG                                      |
| <b>4:35 PM – 5:00 PM</b>   | <b>PERFORMANCE TRIVIA FOR EVERYONE!</b><br>David Spaulding, DPS, CIPM, TSG  |
| <b>5:00 PM – 6:00 PM</b>   | <b>NETWORKING &amp; DRINKS RECEPTION</b>  |

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#### AGENDA DAY TWO: THURSDAY, JUNE 11, 2026

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| <b>8:00 AM – 8:45 AM</b>   | <b>BREAKFAST SPONSORED BY CFA INSTITUTE</b>  |
| <b>8:45 AM – 9:00 AM</b>   | <b>WELCOME BACK AND AWARDS</b><br>David Spaulding, DPS, CIPM, TSG and Douglas Spaulding  |
| <b>9:00 AM – 9:30 AM</b>   | <b>CIPM Through the Practitioner Lens</b><br>is a facilitated discussion designed to gather direct, candid feedback from PMAR attendees on the CFA Institute's CIPM designation. This session will focus on real-world experience, including the perceived value of the credential, its relevance to day-to-day roles, and how well it supports career development in today's performance environment. Attendees will be encouraged to share what's working, what's missing, and where the designation could evolve to better meet the needs of practitioners. |
| <b>9:30 AM – 10:30 AM</b>  | <b>YOU CAN'T FIND SKILL IN RETURNS:<br/>DISTINGUISHING PERFORMANCE FROM THE<br/>DECISIONS THAT GENERATE THEM</b><br>Michael Ervolini, Skill Versus Luck, LLC   |
| <b>10:30 AM – 11:00 AM</b> | <b>MORNING BREAK</b>   |
| <b>11:10 AM – 12:00 PM</b> | <b>THE THIRTEEN COMMANDMENTS OF RISK FOR<br/>ASSET MANAGERS AND ASSET OWNERS</b><br>Dan diBartolomeo, Northfield   |
| <b>12:00 PM – 1:00 AM</b>  | <b>LUNCH</b>   |
| <b>1:00 PM – 2:00 PM</b>   | <b>INNOVATIVE WAYS TO PRESENT PERFORMANCE:<br/>DASHBOARDS &amp; ANALYTICS</b><br>Jennifer Barnette, CIPM, TSG; Mike Beck, CFA, CAIA, CFP; and Prasanth Pahi, CPA, CFA, OMERS   |
| <b>2:00 PM – 3:00 PM</b>   | <b>PERFORMANCE PROBLEMS</b><br>David D. Spaulding, DPS, CIPM, TSG  |
| <b>3:00 PM – 3:15 PM</b>   | <b>CONFERENCE CONCLUDES - RAFFLE PRIZES</b>  |

