

# *The Journal of Performance Measurement®*

## Twenty-fourth Annual

### International Performance Measurement, Attribution & Risk Conference

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

|                            |                                                                                                                                                                                                                                                                   |
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| <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: PRACTICAL IMPACTS AND OBSERVATIONS</b><br>John Longo, Ph.D., Rutgers Business School                                                                                                                                         |
| <b>9:50 AM – 10:40 AM</b>  | <b>FIXED INCOME ATTRIBUTION</b><br>Claude Giguère, 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 PERFORMANCE USING VECTORS</b><br>Arun Muralidhar, Ph.D., Mcube Investment Technologies, LLC                                                                                                                       |
| <b>12:00 PM – 1:00 PM</b>  | <b>LUNCH</b>                                                                                                                                                                                                                                                      |
| <b>1:00 PM – 2:00 PM</b>   | <b>AI, ANXIETY, AND OPPORTUNITY: WHAT PERFORMANCE PROFESSIONALS NEED TO KNOW</b><br>Satheesh Jagannathan, BNY; Jon Loboda, State of Wisconsin Investment Board; Alex Serman, CIPM, First Rate; Douglas Spaulding, TSG; and Patrick Trencansky, CIPM, Diamond Hill |
| <b>2:00 PM – 2:50 PM</b>   | <b>COMMON GIPS CHALLENGES AND HOW TO AVOID THEM</b><br>Ashley Reeves, CIPM, TSG; Matthew Deatherage, CFA, CIPM, Longs Peak Advisory Services; Jessica Murphy, MassPRIM; and Josh O'Brien, CFA, Strategic Investment Group                                         |
| <b>2:50 PM – 3:15 PM</b>   | <b>AFTERNOON BREAK</b>                                                                                                                                                                                                                                            |
| <b>3:15 PM – 3:55 PM</b>   | <b>ATTRIBUTION FOR PORTFOLIOS WITH PASSIVE ASSETS</b><br>Stephen Campisi, CFA, The Pensar Group                                                                                                                                                                   |
| <b>3:55 PM – 4:35 PM</b>   | <b>MAKING SENSE OF PUBLIC MARKET EQUIVALENTS: 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><i>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.</i><br>Rob Langrick, CFA, CIPM, CFA Institute |
| <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>11:00 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 PM</b>  | <b>LUNCH</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
| <b>1:00 PM – 2:00 PM</b>   | <b>INNOVATIVE WAYS TO PRESENT PERFORMANCE:<br/>DASHBOARDS &amp; ANALYTICS</b><br>Jane Atmodjojo, CFA, CIPM, EquiForce; Jennifer Barnette, CIPM, TSG; Prasanth Pahi, CPA, CFA, OMERS; and Paul Rodriguez, Confluence                                                                                                                                                                                                                                                                                                                                                                                             |
| <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>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |

