The BIG I – Investor and Issuer Invitational Forum™

The Influence of AI in IR

Baruch College
William & Anita Newman Conference Center
Room H750
151 East 25th Street, 7th Floor
New York, NY 10010

March 24, 2020

8:30-9:00 Registration

9:00-9:15 Welcome
   • Gary LaBranche, President & CEO, NIRI

Quantamental expert Jon Neitzell describes how to turn data overload into opportunity through process. A look at how asset managers integrate data and human research by charting a path between mental heuristics and purely data driven approaches. Includes a use case of an asset manager incorporating all forms of information, including alternative data, into idea generation, portfolio construction and risk analysis to drive outperformance.
   • Jonathan Neitzell, Founder, Anduril Partners

10:00-10:30 Models, Machines and Money – Gregory Zuckerman and the Birth of Quants
A fireside chat with Wall Street Journal Special Writer Gregory Zuckerman on his new book, “The Man Who Solved the Market: How Jim Simons Launched the Quant Revolution.” By penetrating the ranks of the intensely secretive Renaissance Technologies, Zuckerman tells the fascinating story of the greatest money-making machine in Wall Street history that helped kick-start the quantitative investing revolution. All Big I attendees will receive a signed copy of the book.
   • Gregory Zuckerman, Special Writer, The Wall Street Journal
   • Moderator: Tim Quast, President, ModernIR

10:30-11:00 Break

11:00-12:00 State of Advanced Tech in the Buy-side Today and What the Future Holds
After a brief history of the quant revolution, a look at innovative and surprising ways the buy-side is using AI, where this trend may be headed, and what it means for the public companies whose equities are at the core of the discussion.

12:00-1:00 Lunch
1:00-2:00  Disruptive Technologies and Communications with Investors: Insights from Academia
Academia has begun researching how the latest disruptive technologies such as data analytics and artificial intelligence are reshaping how investors analyze financial communications. Academic thought leaders summarize this intriguing body of work and provide relevant takeaways to help public companies and investor relations professionals engage with investors in the evolving disclosure landscape.
  • Kristi M. Rennekamp, CFA, PhD, Associate Professor of Accounting, Cornell University
  • Blake A. Steenhoven, CPA, PhD Candidate, Cornell University
  • Brian J. White, CPA, PhD, Associate Professor of Accounting, The University of Texas at Austin

2:00-2:45  Tech Tools
Technology is driving evolution throughout every corner of the capital markets ecosystem including products and services. Get a glimpse of some of the cutting-edge tools now being used by buy-side, traders, investor relations officers and more.
  • Moderator: Sam Levenson, Founder and Chief Executive Officer, Arbor Advisory Group
  • Greg McCall, Co-Founder, President & CFO, Equity Data Science
  • Dan Romito, AVP, IR Business Development & Product Strategy, Nasdaq
  • Evan Schnidman, PhD, Head of Data Innovation and President, Prattle

2:45-3:00  Break

3:00-3:55  Merging Megatrends: AI+ESG=Alpha
Investors are now using natural language processing to analyze public company ESG disclosures to evaluate whether companies are backing up their claims with action. Learn how some investors are leveraging AI and ESG data to improve investment decisions, and what companies can do to facilitate this evolving investment style.
  • Moderator: Emily Chasan, Sustainable Finance Editor, Bloomberg
  • Mike Chen, PhD, Director and lead ML Researcher, PanAgora Asset Management

3:55-4:25  Stakeholder Discussion: Approaching a Strategic Level Consensus
Harnessing the power of the participants’ views to drive consensus around solutions. What are the day’s learnings? How to collaborate to achieve mutually advantageous goals? What actions need to be taken and by whom?
  • Gary LaBranche, President & CEO, NIRI

4:25-4:30  Closing Remarks
  • Melissa Plaisance, Board Chair, NIRI, and Group Vice President, Treasury & Investor Relations, Albertsons Companies

4:30-5:30  Networking Reception