

**MEMO# 35325**

May 26, 2023

# Registration Open for ICI Research Committee Zoom June 2023 Meeting

[35325]

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TO: Research Committee RE: REGISTRATION OPEN for ICI Research Committee Zoom June 2023 Meeting

The purpose of this memo is to provide the registration information and preliminary agenda for the ICI Research Committee video meeting on Zoom on June 7, 2023 (12:30 to 4:00 p.m. ET) and June 8, 2023 (12:30 to 4:00 p.m. ET). As the preliminary agenda below indicates, ICI Research Committee will focus on trends in active management.

## AGENDA

### June 7–8, 2023

**DAY 1:** June 7, 12:30 to 4:00 p.m. (ET)

12:30 p.m.: Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

12:45 to 1:30 p.m.: Industry Update and Key Takeaways from the 2023 ICI Fact Book

- Sean Collins, Chief Economist, ICI
- Shelly Antoniewicz, Senior Director, Industry & Financial Analysis, ICI

1:30 to 1:45 p.m.: Brief Break

1:45 to 3:30 p.m.: Trends in Active Management, Part I

- Joseph Nelesen, Senior Director, Index Investment Strategy at S&P Dow Jones Indices
  - Trends in fund performance
- John Rekenhalter, Director of Research, Morningstar Research Services LLC
  - Trends in active management
- Kevin Gallagher, principal, Casey Quirk, Deloitte Consulting LLP
  - Macro active investment environment

3:30 p.m.: Regulatory Update

- ICI Staff will update the committee on recent developments at the SEC.

4:00 p.m.: Adjourn

**DAY 2:** June 8, 12:30 to 4:00 p.m. (ET)

12:30 p.m.: Welcome Remarks and Antitrust Reminder

- Paul Schaeffer, IndexIQ, and Sarah Holden, ICI

12:45 to 1:45 p.m.: Trends in Active Management, Part II

- Dave Nadig, Financial Futurist for ETF Trends and ETF Database
  - Active ETF flows
- Bob Rice, Managing Partner, Tangent Capital
  - Alternatives and active management
- Lubasha Heredia, Managing Director and Partner, Boston Consulting Group
  - The Tide Has Turned  
(<https://www.bcg.com/press/15may2023-global-asset-management-transform-to-thrive>)

1:45 to 2:00 p.m.: Brief Break

2:00 to 2:45 p.m.: Washington Update on Retirement and Fund Policy

- ICI Government Affairs staff will update the committee on recent developments with policymakers.
- ICI Law staff will update the committee on recent developments in regulatory circles related to retirement policy.

2:45 to 3:15 p.m.: Retirement Market Update

- ICI staff to update committee on recent developments in retirement research.

3:15 p.m.: Committee Discussion of Next Meeting's Topics and Format (In-person? Hybrid?)

4:00 p.m.: Adjourn

## REGISTRATION

Please register at: <https://cvent.me/D02KOG>.

Please feel free to share this invitation with other colleagues. While we hope you can join us, we welcome non-committee members, as well.

Paul Schaeffer  
Chairman, Research Committee  
IndexIQ

Sarah Holden

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