



## **DELIVERING ALPHA**

**July 17, 2013**

***Agenda as of July 10, 2013***

---

*Additional Panelists will be named closer to the event*

7:30-8:20 a.m. **BREAKFAST AND REGISTRATION**

8:20-8:30 a.m. **WELCOME**

*Master of Ceremonies: Tyler Mathisen, Co-Anchor, "Power Lunch" and "Nightly Business Report produced by CNBC" and Vice President, Strategic Editorial Initiatives, CNBC*

- Diane Alfano, *Chairman, Institutional Investor*
- Mark Hoffman, *Chief Executive Officer and President, CNBC*

8:30-9:00 a.m. **KEYNOTE PRESENTATION**

Jacob J. Lew, **The 76<sup>th</sup> United States Secretary of the Treasury**

*Interviewed by: Steve Liesman, Senior Economics Reporter, CNBC*

***\*Please note: Doors will close at 8:20 a.m. sharp. No one will be permitted to enter or exit once the Treasury Secretary arrives. Doors will reopen at the conclusion of the opening keynote address.***

9:00-9:45 a.m. **THE GLOBAL STAGE**

As deleveraging, debt and central bank decisions dominate headlines, there is no lack of actionable news across the financial world. The recent boom and bear market in Japan is a prime example. In an era of filled with pitfalls and windfalls, where are the world's best investors finding opportunities on the global stage and how can you profit from it?

*Moderator: Michelle Caruso-Cabrera, Chief International Correspondent, CNBC*

*Panelists:*

- Mary Callahan Erdoes, *Chief Executive Officer, J.P. Morgan Asset Management*
- David McCormick, *Co-President, Bridgewater Associates*
- Jane Mendillo, *President and Chief Executive Officer, Harvard Management Company*
- Richard Perry, *Chief Executive Officer, Perry Capital*

9:45-10:15 a.m. **KEYNOTE PRESENTATION**

Preet Bharara, **United States Attorney–Southern District of New York**

*Interviewed by: Jim Cramer, Host, "Mad Money w/Jim Cramer" and Co-Anchor, "Squawk on the Street," CNBC*

10:15-10:45 a.m. **COFFEE BREAK**

10:45-10:50 a.m. **PwC's EARN YOUR FUTURE**

*Comments by: Robert E. Moritz, Chairman and Senior Partner, PwC*

10:50-11:30 a.m. **THE GREAT ROTATION**

Two years ago analysts began predicting a major move from bonds back into equities as investors who had fled the stock market after the financial crisis returned in droves. The recent spike in interest rates suggests the Great Rotation is here! What can investors do now to make money in a rising interest rate environment?

*Moderator:* Becky Quick, Co-Anchor, "Squawk Box," **CNBC**

*Panelists:*

- Gregory J. Fleming, *President, Morgan Stanley Wealth Management*
- Joshua S. Friedman, *Co-Founder, Co-Chairman and Co-Chief Executive Officer, Canyon Partners*
- Michael Hintze, *Founder and Chief Executive Officer, CQS*
- Andrew J.M. Spokes, *Managing Partner, Farallon Capital Management*

11:30-12:30 p.m. **MY NEW BEST IDEA**

We've asked some of the world's most renowned investors to share their best, most actionable ideas. Where should you put your next dollar? Find out here.

*Moderator:* David Faber, Co-Anchor, "Squawk on the Street," **CNBC**

*Panelists:*

- Jim Chanos, *Founder and Managing Partner, Kynikos Associates*
- Leon G. Cooperman, *Chairman, Omega Advisors, Inc.*
- Chris Hohn, *Founder, Managing Partner and Portfolio Manager, The Children's Investment Fund Management*
- Mark E. Kingdon, *President and Founder, Kingdon Capital Management*

12:30-2:15 p.m. **LUNCHEON WITH KEYNOTE**

John Paulson, *President and Portfolio Manager, Paulson & Co. Inc.*

*Introduced by:* M. Barry Bausano, *President – Deutsche Bank Securities Inc. and Co-Head Markets Prime Finance, Deutsche Bank*

*Interviewed by:* Carl Quintanilla, Co-Anchor, "Squawk on the Street," **CNBC**

2:15-2:50 p.m. **POWERING AMERICA**

For the power players—it's boom time in America. What are the investment implications for the explosion of domestic energy sources? What are the best plays for smart institutional allocators?

*Moderator:* Kate Kelly, *Wall Street Reporter, CNBC*

*Panelists:*

- Clint Carlson, *President and Chief Investment Officer, Carlson Capital, L.P.*
- Andrew Feldstein, *Chief Executive Officer and Chief Investment Officer, BlueMountain Capital Management*
- Gumersindo Oliveros, *Chief Executive Officer and Chief Investment Officer, KAUST Investment Management Company*

2:50-3:20 p.m. **ALPHA AGITATOR**

Nelson Peltz, *Founding Partner and Chief Executive Officer, Triun Fund Management, L.P.*

*Interviewed by:* Andrew Ross Sorkin, Co-Anchor, "Squawk Box," **CNBC**

3:20-3:50 p.m. **HEALTH, WEALTH AND HAPPINESS**

Three years after being signed into law by President Obama, the Affordable Care Act is set to change the investment landscape, reducing the number of uninsured Americans while raising the cost of providing health care coverage for many companies. We'll explore the winners and losers under Obamacare in the search for "Affordable" alpha.

*Moderator:* Michael Peltz, *Editor, Institutional Investor Magazine Group*

*Panelists:*

- Jacob Gottlieb, *Managing Partner and Chief Investment Officer, Visium Asset Management*
- Kris Jenner, *Senior Partner, Rock Springs Capital*
- Larry Robbins, *Founder, Portfolio Manager and Chief Executive Officer, Glenview Capital Management*

3:50-4:20 p.m. **COFFEE BREAK**

4:20-5:00 p.m. **ASSET BUBBLES**

The wisdom of crowds is popular—except when it comes to investing. When the masses rush into comparable trades and trends, the result is diminished returns and compromised capacity. As top investors seek the holy grail of non-correlated returns, how are they angling to strike first and avoid the crowds?

*Moderator:* Kelly Evans, *Co-Anchor, "Squawk on the Street," CNBC*

*Panelists:*

- Michael Novogratz, *Principal and Director, Fortress Investment Group LLC*
- Michael Sacks, *Chief Executive Officer, Grosvenor Capital Management, L.P.*
- Steve Kuhn, *Partner and Head of Fixed Income Trading, Pine River Capital Management*
- David C. Villa, *Chief Investment Officer and Chairman, State of Wisconsin Investment Board*

5:00-5:30 p.m. **ALPHA AGITATOR**

Carl Icahn, *Chairman, Icahn Enterprises*

*Interviewed by:* Scott Wapner, *Host, "Fast Money Halftime Report," CNBC*

5:30 p.m. **COCKTAIL RECEPTION**