

PENSION GROUP EAST

September 9, 2025

8:20-8:50 AM	Light breakfast
8:50 – 9:00 AM	Welcome & Opening Remarks Melanie Pickett , President, Asset Servicing, Americas, The Northern Trust Company Joy Xu , President, Pension Group East Senior Director at Verizon Investment Management Corp
9:00 – 9:50 AM	Mid-Year Economic and Market Outlook Grant Johnsey – Head of Client Solutions, Asset Servicing, Capital Markets, Americas, Banking and Markets <ul style="list-style-type: none">• Understanding the drivers and risk behind strength in US equities• Implications for US interest rates and the yield curve• Inflation hedge: Gold or other commodities• Looking forward: developments to look for in markets over the next year
9:50 – 10:00 AM	Break
10:00 – 10:50 AM	The Democratization of Private Market Investments in DC Bob Morgan , Executive Vice President and Managing Director, Northern Trust Asset Management (NTAM) Patrick Finegan , Head of Alternative Products at NTAM <ul style="list-style-type: none">• What is driving democratization? (Technology, regulatory changes, products, investor demand)• Risks/benefits of the evergreen structures and considerations for plan sponsors• Implications and potential opportunities
10:50 – 11:00 AM	Break
11:00 – 11:40 PM	AI and Asset Management: Application to Rebalancing Arun Muralidhar , Co-Founder AlphaEngine Global Investment Solutions, LLC. <ul style="list-style-type: none">• The importance of rebalancing• How AI and Big Data can be used to add value and improve risk management
11:40 – 11:50 AM	Break
11:50 – 12:30 PM	Plan Sponsor Roundtable Discussion <i>Plan Sponsors Only</i>
12:30 – 1:30 PM	Lunch