

WFIC 2017

WORLD FINANCIAL INFORMATION CONFERENCE

SEPTEMBER 24-27 – BARCELONA, SPAIN

SATURDAY, SEPTEMBER 23

8:45 A.M. - 4:30 P.M.

Montserrat Mountain & Codorniu (Cava) Tour* Optional

** Optional Event*

Event/Additional Fee of \$125 USD Required

Enjoy a full day of networking with colleagues as you experience the culture and history of Barcelona!

Guests will first visit the Codorniu Winery that produces Spanish Champagne – cava. The magnificent combination of sea, mountains and air create an excellent microclimate for the optimum maturation of the grapes that produce Codorniu sparkling wines.

Next, guests will visit Montserrat Mountain - a very important part of Barcelona and its culture. On our way there, the guide will explain about the day that awaits us and about Montserrat. The name “Montserrat” means, “Serrated Mountain” in Catalan.

Lunch is included.

Minimum number of seats available and we expect to sell out quickly so reserve your spot early!

SUNDAY, SEPTEMBER 24

7:00 A.M. - 4:00 P.M.

Market Data Cup Golf Tournament at Club de Golf Barcelona

** Optional Event*

Limited number of registrants allowed

Golf Tournament at the beautiful [Club de Golf Barcelona](#) – Who will win the Market Data Cup this year? Join your customers, colleagues and competitors for the 6th Market Data Cup Tournament sponsored by Tullett Prebon Information.

Transportation, breakfast, lunch and light cocktail reception included.

11:15 am – 2:00 pm: Golf Clinic at [Club de Golf Barcelona](#) ** Optional Event*

Not Ready to Commit to the Tournament? Enjoy a golfing experience without the competition and participate in a 2-hour expert clinic sponsored by [Tullett Prebon Information](#) at The [Club de Golf Barcelona](#). Transportation and golf club hire included.

9:45 A.M. - 2:30 P.M.

Barcelona City Tour

** Optional Event/Additional Fee of \$75 USD Required*

Join fellow conference attendees as you are guided through the fascinating sights of Barcelona! **Note: Certain portions require some walking.**

Sights include:

- Park Guell – Inside Visit
- Plaza de Catalunya – From the Bus
- Gothic Quarter – Walking Tour
- Santa Maria Del Mar – Walking Tour
- 12:30 – 1:30 – Free Time for Lunch
- Montjuic Hill – Brief Stop

Minimum number of seats available and we expect to sell out quickly so reserve your spot early!

**Please note that a minimum number of registrants has to be reached in order to proceed with this activity. If minimum number is not achieved, FISD will cancel this activity and refund paying attendees accordingly.*

4:30 P.M. - 6:00 P.M.	<p>Sponsor and Customer Only Cocktail Party</p> <p>This exclusive gathering between WFIC sponsors and consumer* delegates at the Palau Conference Center will give sponsors extra exposure to customer firms. <i>*Consumers planning to take advantage of the consumer travel stipend program must attend this reception.</i></p>
6:00 P.M. - 8:00 P.M.	<p>Welcome Reception Sponsored by Thomson Reuters</p> <p>Meet and confer with colleagues at the Palau Conference Center. The welcome reception is open to all WFIC delegates.</p>
MONDAY , SEPTEMBER 25	
7:30 A.M. - 5:00 P.M.	<p>Registration</p>
8:50 A.M. - 8:55 A.M.	<p>Opening Remarks</p> <p>Tom Davin, FIA, Managing Director, FISD</p>
8:55 A.M. - 9:00 A.M.	<p>Welcome and Introduction of Keynote</p> <p>Yousaf Hafeez, Director, Capital Markets Development & Chair, FISD Exec Committee, BT</p>
9:00 A.M. - 9:30 A.M.	<p>Keynote</p> <p>Lynn Martin will discuss key trends, regulatory drivers and business opportunities in the global market data business. Keynote Speaker: Lynn Martin, President & COO, ICE Data Services</p>
9:30 A.M. - 10:25 A.M.	<p>Setting the Stage: Data Consumers Lay Out Three Major Challenges</p> <p>WFIC will lead off with the consumers of financial data outlining the three themes that they would like to address during WFIC, and challenging the delegates and the industry to work with them on these issues. In this session, we will get unvarnished perspectives from senior financial data executives at leading banks and buy-side firms on concerns they have with their suppliers, downstream customers, and the overall regulatory and economic environment. The themes raised in this session will resonate throughout the three days of WFIC programming as they are addressed at breakout roundtables on Day 2 and by senior executives from vendors and exchanges as the capstone of Day 3.</p> <p>Moderator: Marc McLaughlin, CEO & Business Designer, Do Tank</p> <p>Panelists: Ken Brady, Global Head of Market Data, Morgan Stanley John Chappell, EMEA Market Data Services, Goldman Sachs Marcy Pike, FIA, Senior Vice President, Market Data, Fidelity Investments Alan Ross, Global Head of Market Data Services , UBS Dorthe Jul Vindal, Market Data Manager, Danske Bank</p>
10:25 A.M. - 10:55 A.M.	<p>Break</p>
10:55 A.M. - 11:15 P.M.	<p>Standards: Evolving for future generations</p> <p>This presentation will cover the origins, growth and development of financial services standards such as ISO standards ISIN, CFI and FISN. Join to learn about industry contributions on standards development with respect to fitness for purpose, regulatory adoption and likely evolution. Emma Kalliomaki, Managing Director, Association of National Numbering Agencies srl.</p>
11:15 A.M. - 12:00 P.M.	<p>MiFID II Readiness, An Industry Checklist</p> <p>As the January 2018 deadline is fast approaching, this session will take a look at the steps towards MiFID II compliance. What have various sectors of the industry had to do to prepare? What implications does MiFID II have on non-EU firms? MiFID II seeks to improve investor protections through better transparency and corporate governance, as well as research unbundling, best execution guidelines and transaction reporting. This session will focus on the standards being developed to respond to the mandate and the challenges to managing reference data in the new environment.</p> <p>Moderator: Anastasia Dokuchaeva, CEO, AD Consulting</p> <p>Panelists: Chris Johnson, Senior Product Manager, Market Data, HSBC Securities Services John Mason, Head of Regulatory and Market Structure Propositions, Thomson Reuters Scott Preiss, Managing Director, Global Head of CUSIP Global Services, CUSIP Global Services</p>

	Dr. Matt Woodhams, Ph.D. , Managing Director, Head of Information, GFI Group for FENICS Market Data Richard Young , Industry and Regulatory Strategy, Bloomberg Global Data	
12:00 P.M. - 12:45 P.M.	Who's Afraid of Data Management? 'Data Management' as a broad idea, couldn't be simpler. It's the administrative process by which required information is acquired, validated, stored, protected, and processed, and by which its accessibility, reliability, and timeliness is ensured to satisfy the needs of the data users. That being said, perhaps the biggest challenge is what to do if the data you are managing is incomplete, inconsistent, late, unavailable from the normal sources, etc. How do you resolve these conflicts? How do you source data to fill gaps? How do you structure the data when all of the sources publish with different standards? Who does the regulator hold responsible if the data you are sourcing is wrong? ... Suddenly things are not quite so 'simple'. Moderator: Dennis Slattery , CEO, EDM Works Panelists: David Coluccio , VP Head of Enterprise Solutions, S&P Global Market Intelligence Andrew Delaney , President & Chief Content Officer, A-Team Group Peter Moss , CEO, SmartStream RDU Ken Zockoll , Senior Vice President, Symbology & Reference Data, FactSet Research Systems, Inc.	
12:45 P.M. - 2:00 P.M.	Lunch	
2:00 P.M. - 2:20 P.M.	Constituent Groups	Consultant Round-Up
	FISD Constituent Groups - By invitation only	TBD
2:20 P.M. - 2:50 P.M.	Constituent Groups	Consultant Round-Up
	FISD Constituent Groups - By invitation only (continued)	McKinsey & Company: Capital Markets Infrastructure, An Industry Embracing Data & Advanced Analytics
2:50 P.M. - 3:20 P.M.	Constituent Groups	Consultant Round-Up
	FISD Constituent Groups - By invitation only (continued)	Burton-Taylor International Consulting: Market Data Industry Statistics and Survey Results
3:20 P.M. - 3:35 P.M.	Break	
3:35 P.M. - 4:20 P.M.	Panel Discussions	Technology Forum
	Creating and Capturing Value: Content Provider Perspectives	Clouding the Issue
4:20 P.M. - 5:00 P.M.	Panel Discussions	Technology Forum
	Data Provider Policies & Licensing Best Practices: Consumers Accentuate the Positive	Next Gen Distribution Platforms
6:00 P.M. - 10:00 P.M.	Lifetime Achievement Award Dinner REGISTRATION CLOSED. Unfortunately, this event is at capacity. For more information, Click Here	
T U E S D A Y , S E P T E M B E R 2 6		
7:30 A.M. - 5:00 P.M.	Registration	
8:50 A.M. - 8:55 A.M.	Opening Remarks	

8:55 A.M. - 9:00 A.M.	<p>Welcome and Introduction of Keynote Debra Walton, Global Managing Director, Customer Proposition, Financial & Risk, Thomson Reuters</p>
9:00 A.M. - 9:30 A.M.	<p>Keynote Dr. Kay Swinburne will discuss Brexit and its likely impacts. Keynote Speaker: Dr. Kay Swinburne, MEP, Vice Chairman of Economic and Monetary Affairs Committee, European Parliament</p>
9:30 A.M. - 9:50 A.M.	<p>Introduction to Alternative Data Sets This primer on alternative data will give a basic overview of the topic and kick off a full morning of discussions on social media, ESG and alternative commodities data. Basic questions to be answered will include: Why is alternative data “alternative”? How do you find it? How should it be valued, priced and sold? What are the distribution mechanisms? Are intermediaries necessary or is raw data consumable? How developed is the alternative data industry and what are some relevant sample cases? Dan Connell, Managing Director, Greenwich Associates</p>
9:50 A.M. - 10:35 A.M.	<p>Doing Well by Doing Good: The Rise of Environmental, Social and Governance (ESG) Data At first glance ESG appears to be the most crunchy-granola of topics, but involved consumers and providers are becoming finely attuned to real market forces currently affecting business decisions. This exploration will begin with a short explanation of the definition of ESG and how it is utilized, including the source and nature of the demand, and how data is gathered, tracked, measured and audited. The panel will then delve into the kinds of standards that are emerging and who is supporting them as well as who is not. Finally, the discussion will coalesce around the question of whether ESG has legs for the long haul. Certain global sectors are retreating from the environmental and social standards that underpin ESG data, while others are participating in hitherto unseen investment activism. Which view will prevail and where does that leave ESG? Moderator: Sallianne Taylor, Global Manager, Market Structure and Strategic Alliances, Bloomberg L.P. Panelists: Dr. Chris Godfrey, Lecturer, Alliance Manchester Business School (Manchester University) Piet Klop, Senior Advisor Responsible Investment, PGGM Elena Philipova, Head of Company Content Management, I&A, Thomson Reuters Antti Savilaakso, Partner, Auriel Capital Conor Sheehan, Market Data Regional Manager, Capital Group Research Inc</p>
10:35 A.M. - 11:00 A.M.	<p>Break</p>
11:00 A.M. - 11:30 A.M.	<p>Smart Data Big data analysis and machine learning are offering new insights and opportunities and changing participants’ views on the markets. Hartmut Graf of Deutsche Boerse will discuss how Smart Data is being used to make enhanced trading decisions based on extended non-public data, the application of in-depth analysis, and new ways of analyzing data and structures. Presenter: Dr. Hartmut Graf, Executive Director, Head of Data Services; Deputy Head of Market Data + Services, Deutsche Boerse Group</p>
11:30 A.M. - 12:15 P.M.	<p>How Commodities Data Became Cool Satellite imagery, sensors on farming equipment and clandestine flights over oil wells are playing their part in exposing the notoriously secretive commodities industry to something like transparency. As data collection technology is allowing more measurements through more devices than ever before, the breadth of available data is growing too. This panel session will delve into areas of growth, unique problems around data ownership, untapped sources and the future of analytics and access. Moderator: Morgan Downey, CEO, Money.net Panelists: Deirdre Alphenaar, Ph.D., Chief R&D Officer, Genscape Ollie Cadman, Head of Product & Strategy, EMEA, Vela Martin Finnis, Global Head of Market Data, Macquarie Group Bryan Yates, Director of Sales - EMEA, Orbital Insight</p>
12:15 P.M. - 1:00 P.M.	<p>Social Media Grows Up</p>

	<p>The use of social media in the financial markets is now expected as de rigueur, but how exactly does that work? This panel will cover a number of case studies including more avant-garde and traditional use-cases, as well as emerging services and technologies. Some challenges of social media are uniquely puzzling; for example, how should the industry handle a senior politician's twitter feed and the rise of 'fake news'? Also, who filters the filterers when it comes to ingesting raw feeds vs. refined and filtered content? Finally, how can you understand social media if you're not a millennial?</p> <p>Moderator: Stephen W. Morse, Consultant Advisor, Neudata</p> <p>Panelists: Sebastien Astie, CTO, Pluribus labs Peter Bailey, Chief Strategy Officer, Dataminr Charles Farara, Application Specialist, News, Bloomberg Jared Podnos, Global Head of Financial Data Partnerships , Twitter</p>	
1:00 P.M. - 2:25 P.M.	Main Lunch	Workshop Luncheon: Consumers Only
	Lunch hosted by Silver Sponsors	Index Workshop - Alternative Indexes (Consumer Delegates ONLY)
2:25 P.M. - 3:10 P.M.	Panel Discussions	Roundtables
	The Rise in Passive Investing - Causes, Consequences and Choices	Small group discussions on different financial information topics
3:10 P.M. - 3:55 P.M.	Panel Discussions	Roundtables
	The Changing State of Messaging	Roundtables (continued)
3:55 P.M. - 4:10 P.M.	Break	
4:10 P.M. - 5:00 P.M.	<p>Best Hires Equal Best Results: The Financial Information Industry Needs Women Too</p> <p>It is now widely understood that organizations with a higher percentage of female participation, especially at executive levels, perform better than those that are singularly male, and yet financial services on the whole continues to lag behind stated diversity goals. In this panel, leading women in financial information and their supporters will shed light on some of the invisible barriers that tend to hold women back, how they overcame them and why both men as well as women should be paying attention to this issue.</p> <p>Moderator: Angela Wilbraham, CEO, A Team Group</p> <p>Panelists: Tim Baker, CFA, Global Head of Innovation, Thomson Reuters Linda G. Clarkson, VP, Director News, Research, Filings & Transcripts, FactSet Bonnie Eshel, Global Head of Content Strategy & Acquisition, ICE Data Services Sallianne Taylor, Global Manager, Market Structure and Strategic Alliances, Bloomberg L.P. Christina Young, Specialist Leader, Technology and Financial Services, Deloitte Consulting</p>	
6:00 P.M. - 11:00 P.M.	<p>Off-Site Dinner Event, Sponsored by Deutsche Boerse Group</p> <p>REGISTRATION CLOSED. Unfortunately, this event is at capacity. Join colleagues for an evening of networking at the Casa Llotja de Mar. This semi-formal event, sponsored by Deutsche Boerse Group, includes transportation, a reception, dinner and entertainment. Suggested dress code is semi-formal.</p>	
W E D N E S D A Y , S E P T E M B E R 2 7		
7:30 A.M. - 12:00 P.M.	Registration	
8:50 A.M. - 8:55 A.M.	Opening Remarks	
8:55 A.M. - 9:00 A.M.	Welcome and Introduction of Keynote	

	<p>Kevin Morgan, Head of Market Data, HSBC</p>
9:00 A.M. - 9:30 A.M.	<p>Keynote Dr. Craig Knight will address the latest developments in organizational science which seem to point to an imminent fork in the managerial road. One way leads to a jammed superhighway and more anemic consultancy rhetoric, the other is a confronting switchback where it should be possible to realize extraordinary personal and organizational benefits. Keynote Speaker: Craig Knight, PhD MSc CPsychol HCPC HRF (Exon) BSCAH, Founder and Director, Haddleton Knight Limited</p>
9:30 A.M. - 10:30 A.M.	<p>Vendors and Data Providers Rise to the Occasion Senior executives from major vendors, exchanges, and data providers will discuss how they are seeking to better serve their customers' needs, and will respond specifically to the "three challenges" raised by the consumer panel on Day 1 and elucidated at the roundtables on Day 2. The emphasis will be on how these firms are working, and plan to work, with their clients to address the issues posed by the current environment. Moderator: Marc McLaughlin, CEO & Business Designer, Do Tank Panelists: Ed Addvensky, Vice President - Americas Sales, ICE Data Services Frank Desmond, CEO, Data & Analytics Division, TP ICAP Julie Menacho, Executive Director, Global Head of Market Technology Services, CME Group Frank Piasecki, President, Activ Financial Debra Walton, Global Managing Director, Customer Proposition, Financial & Risk, Thomson Reuters</p>
10:30 A.M. - 11:00 A.M.	<p>Break</p>
11:00 A.M. - 11:45 A.M.	<p>Machine Learning with New and Old Data Whether data is traditionally or alternatively sourced, the steps to make it consumable remain the same: normalization, valuation, determining units of count, storage, distribution and access. The growth of artificial intelligence/machine learning and other emerging technologies may offer additional challenges at points within the management process. This session is about getting data ready for the breadth of new technology available, who worries about it, what they have to fear and how easy or difficult it is to overlay certain technologies with particular data sets. Moderator: Adam Honore, Executive Director, CME Group Panelists: Armando Gonzalez, President & CEO, RavenPack Marion Leslie, Managing Director, Enterprise, Thomson Reuters Scott Mullins, Head, Worldwide Financial Services Business Development, Amazon Web Services Michael O'Rourke, Vice President, Head of Machine Intelligence and Data Services, Nasdaq Michael Patton, Senior Director, Enterprise Solutions, S&P Global Market Intelligence</p>
11:45 A.M. - 12:30 P.M.	<p>Divining the Future of FinTech FinTech incubators, accelerators and the start-up firms they support have proliferated in the past several years, bolstered by investment from traditional financial information players, angel investors and even governments. Simply due to the breadth of the entries into the space, it's difficult to determine which new products and technologies are likely to prevail, but it is possible to survey market trends. This panel will bring together incubators, accelerators and others who prop up and play in this sandbox for an overview of what's trending in start-ups now and what is coming. Moderator: Donald Madura, Founder and Managing Director, Madura Associates Panelists: Tim Baker, CFA, Global Head of Innovation, Thomson Reuters Yousaf Hafeez, Director, Capital Markets Development & Chair, FISD Exec Committee, BT Adrian Johnson, Managing Director, Startupbootcamp Dan Schleifer, Co-Founder, CEO, ChartIQ Matthias Voelkel, Global Leader of Capital Markets Infrastructure, Securities Services & Exchanges Practice, McKinsey & Company</p>
12:45 P.M. - 4:00 P.M.	<p>Farewell Networking Reception, Sponsored by CME Group Enjoy views of the Mediterranean Sea and Barcelona beachfront while enjoying light refreshments and post conference banter. Transportation provided from Palau Conference Center to Opium. Casual attire recommended. Bus returns to the hotel at 4:30 pm. For more information, Click Here</p>

