Hear from an Extraordinary Buy-Side Faculty

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AlgoTradingWest

Implementing Best Buy-Side Algorithmic and Electronic Equity Trading Solutions

April 17-18, 2007 • Le Méridien Hotel • San Francisco, CA

The West Coast Industry Event with over 20 Buy-side Case Studies Plus Cutting-Edge Technology Applications

Uncover and apply solutions to sourcing liquidity, implementing best execution strategies and selecting effective and integrative algorithmic trading tools and applications from our buy-side faculty including:

- **TIAA-CREF**
- **CalPERS**
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- **AIG SunAmerica Asset Management**
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Hear in-depth discussions and proven strategies for success from buy-side industry experts as they examine mission-critical issues including:

- **Market fragmentation and its impact on the equities trading landscape**
- **Successfully sourcing liquidity in a world of dark pools**
- **The build *vs.* buy conundrum when deciding on an algo product**
- **Multi Asset Algos and their application beyond the realm of equities**
- **Hedge fund strategies in the application of algorithms**
- **Maximizing investment returns with the incorporation of transaction cost analysis (TCA)**
- **Defining the next smartest, meanest algorithm coming on to the Street**
- **Incorporating crossing vendors into your algorithmic model**
- **Integration of an algorithmic trading platform into your organizational goals**
- **Channeling multiple exchanges: Why the need for speed is greater now more than ever**
- **Creating a harmony between order flow and the integration of technology on your trading desk**
- **Reaching beyond optimal execution with active portfolio management**
- **Streamlining your trading operations with the implementation of smart order routing**

PLUS! Don't Miss Our Pre-Conference Buy-Side Only Closed Door Sessions:

A Must-Attend for All Buy-Side Traders!

After the Bell: What the Trader Needs: Applying Algorithmic Strategies to Achieve Maximum Execution Quality
And
Block Trading, Algorithms and the Buy-Side Trader

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AlgoTradingWest

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Dear Colleague:

World Research Group co-sponsoring with The Wall Street Journal are proud to present **AlgoTradingWest**, our premier West-Coast trading event where the buy-side community hears directly from a buy-side faculty on what they are doing to successfully integrate algorithmic and electronic trading to meet their business goals.

Where is the Next Generation of Algo Product Heading?
And What Form will this Trading Solution Take?

Leveraging on the success of our trading conference series, including **AlgoTrading2006**, TCA, AlgoFX and **Liquidity2007**, **AlgoTradingWest** has a program agenda designed to address the most critical issues faced by the buy-side trader today. With the advent of new regulations, a proliferation of algorithmic tools and the explosion of exchange consolidation, now more than ever the buy-side trader needs the tools necessary to differentiate amongst both algo and electronic product offerings.

Mission Statement of **AlgoTradingWest**

Providing Effective Strategies to the Buy-Side Trader for the Successful Application of Algorithmic and Electronic Trading Solutions to Maximize Execution Quality

Through extensive research and interviews with the buy-side trading community, **AlgoTradingWest** highlights those firms with proven implementation strategies in its application of algorithmic and electronic trading models. Join these top buy-side experts and learn from interactive panel discussions on effective selection tools and techniques when selecting an algo product.

Also, don't miss the **Pre-Conference Buy-Side Only Closed Door Sessions: What the Trader Needs: Applying Algorithmic Strategies to Achieve Maximum Execution Quality** and **Block Trading, Algorithms and the Buy-Side Trader.** These two sessions afford a unique opportunity to freely network with your buy-side peers and discuss the most pertinent issues regarding algorithmic and electronic trading product developments which directly affect your day-to-day experience. This is the only trading event which allows this time for you to discuss, dissect and learn what works and what doesn't in a peer environment.

Join us for two information-packed days of outstanding material solely dedicated to the issues involved with algorithmic and electronic equity trading. Register early as space is limited, simply contact **1-800-647-7600** to reserve your space or register online at **www.worldrg.com.**

I look forward to meeting you in San Francisco.

Sincerely yours,

Stacey P. Mankoff
Director, Finance & Technology Division

WORLD RESEARCH GROUP

PS: Do not miss our "After the Bell" Buy-Side Closed Door Sessions!

Who Will Attend AlgoTradingWest

From Institutional Investment Firms; Asset Management Firms, Hedge Funds; Commodity Trading Advisors (CTAs); Brokers; Academic Institutions; Exchanges and Regulatory Bodies
Senior Executives/Heads of:

- Trading
- Dealing
- Hedge Funds
- Portfolio Management
- Regional Banks
- Investment
- Operations
- Pension Funds
- Mutual Funds
- Fund of Funds
- Endowment Funds, Insurance Funds
- Private Banking
- Wealth Management

As well as:

- Policy and Regulatory Bodies
- Consulting Firms

This conference will also be of interest to companies which provide an algorithmic trading product, OMS providers and platform providers; with the titles of:

- IT
- Electronic Trading
- Connectivity
- Alternative Execution
- Electronic Execution
- Program Trading
- FIX Connectivity
- Technology

DAY ONE • TUESDAY, APRIL 17, 2007

7:15 Buy-side Only Conference Registration and Continental Breakfast

After the Bell: Pre-Conference Buy-Side Only Closed-Door Session

8:00 What the Trader Needs: Applying Algorithmic Strategies to Achieve Maximum Execution Quality

BUY-SIDE ONLY SESSION

In our signature "After the Bell' exclusive buy-side attended session, our faculty of traders address the buy-side's need to understand the most innovative strategies and technology available to maximize execution quality. In today's landscape, there is a proliferation of algorithmic trading models. The challenge to the buy-side trader is the selection and application of the best model for his or her needs. This interactive closed-door session offers the opportunity of a free and frank discussion of what works and what doesn't and applying them to your trading desk. Issues addressed include:

- Determining whether to build your own, buy someone else's off the shelf or purchase a customized algorithmic product
- Successfully grading an algo product
- Portfolio-based algorithmic models vs. single stock algorithms
- Integrating crossing vendors into your algorithmic model
- Budgeting and planning for future changes in trading products

Avachai Tayjasanant
Senior Trader
TIAA-CREF

Dan Bienvenue
Portfolio Manager, Global Equity
CALPERS

Daniel Royal
Senior Equity Trader
ARTISAN PARTNERS

Nenad Yashruti
Head Trader
FREESTONE CAPITAL MANAGEMENT

Paul Ma
Portfolio Manager
AIG SUNAMERICA ASSET MANAGEMENT

TBD
RUSSELL INVESTMENT GROUP

Scott Jensen, CFA
Trader
MCF ASSET MANAGEMENT

Alex Green
Head of Trading
FREEMAN ASSOCIATES INVESTMENT MANAGEMENT

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Scott Jensen, CFA
Trader
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Chris Maxmin
Managing Director
MOON CAPITAL LP

Alex Green
Head of Trading
FREEMAN ASSOCIATES INVESTMENT MANAGEMENT

Paul Farmighetti
Director of Equities Trading
RGM ADVISORS, LLC

7:30 *Buy-side Only Panel Discussion*

8:00 *Buy-side/Algo Solution Provider Exchange*

8:20 *Buy-side Only Panel Discussion Continues*

9:00 *Refreshment & Networking Break*

9:30 Block Trading, Algorithms and the Buy-Side Trader

BUY-SIDE ONLY SESSION

There has recently been an up-tick in the handling of large blocks of stocks by human traders rather than by an algorithm. With the cost of executing a trade so low, it has become imperative for the buy-side trader to analyze how to best capture alpha. With the emergence of algorithmic trading, there was little difference amongst the bulge-bracket firms, but now more than ever there seems to be a swing back to using capital to distinguish one firm from another. But what does this mean for the future of algorithmic trading? And how will the current technologies adapt to this trend?

Alex Green
Head of Trading
FREEMAN ASSOCIATES INVESTMENT MANAGEMENT

John Russell
Vice President & Director
FRANKLIN ADVISERS, INC.

Travis Jordan
President
APEX CAPITAL MANAGEMENT, LLC

Henry Gray
Head of Global Equity Trading
DIMENSIONAL FUND ADVISORS

10:30 *Networking & Refreshment Break; Main Conference Registration Opens*

10:45 *Main Conference Commences; Day One Chairperson's Welcome*

11:00 Quantitative Investment Management: Blending Quantitative Discipline and Fundamental Research

It has never been easy for an investment firm to blend its quantitative research with its fundamental research. This session will discuss Sun America's progress in implementing quant in its Tax Managed Equity Fund. Sun America's quantitative discipline uses a blend of value, growth, and behavioral factors. Stocks selected by fundamental analysts are screened by the quant model to increase the batting average before being put into the Fund. The quantitative discipline forces one to sell a stock when greed sets in and to buy a stock while panic selling takes place. Meanwhile, the fundamental research on the company and the economic conditions reveal not only what quant factors would be favored going forward, but screens out companies troubled by issues not reflected in the numbers.

Paul Ma, CFA
Portfolio Manager and Head of Quantitative Research
AIG SUNAMERICA ASSET MANAGEMENT

11:30 Incorporating Transaction Cost Analysis into Buy-side Trading Algorithms for Maximum Results

- Defining which TCA product best suits your needs
- Measuring best execution: How can you guarantee the results?
- The Holy Grail: Generating alpha with TCA
- Examining critical differences and recent developments in trade analytics
- Incorporating TCA into your OMS
- Linking TCA and algorithms in a real-time environment
- Integrating cutting-edge technology into your trading operations to deliver best execution: DMA, OMS, or algorithms
- Challenges faced in today's fragmented market space
- How do you ascertain whether DMA, algorithms, broker capital or agency representation are best suited to deliver best execution in certain situations
- Creating a harmony between order flow and the integration of trading technology on your desk
- Gaining buy-in: Training and supporting your traders in the implementation of new technology

Dan Bienvenue
Portfolio Manager, Global Equity
CALPERS

TBD
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Avachai Tayjasanant
Senior Trader
TIAA-CREF

12:00 *Luncheon Sponsored by:* ITG INVESTMENT TECHNOLOGY GROUP

1:30 The Need for Speed: Algorithms, Direct Market Access and Market Data

As electronic trading, DMA and algorithms have taken hold, the speed of trading has morphed into warp drive trading in a timeframe of 10-millisecond and less executions. However, the problem with obtaining data at this rate is that the aggregation of data slows down. Today, accordingly, many firms are migrating from using data aggregators to taking in direct feeds from the exchanges and ECNs; however, that is creating its own set of challenges. These include the need to connect to multiple exchanges and ECNs, data storage issues, as well as transporting the data. This session addresses the current challenges faced by the buy-side trader and what they need to do in order to stay ahead of their competition. Also, it will examine how the implementation of Reg NMS will impact the ever-increasing volume of market data and compliance requirements.

Paul Farmighetti
Director of Equities Trading
RGM ADVISORS, LLC

2:00 Algorithms on the Edge: Examining the Meanest Smartest Algorithms on the Street

This session looks inside the current algorithmic offerings today as well as what algo offerings will be replacing them. Since there have been several generations of mathematical-base algorithms, an increasing level of sophistication has been added to this product. With the rising level of market fragmentation and complexity, algos have been rumored to take the place of the trader – but is this a fact? Our speaker discusses the rise and rise of algorithms, where they are now and what's in store for the future.

David Leinweber
Principal
LEINWEBER & CO.

2:30 *Afternoon Networking & Refreshment Break*

3:00 Multi Asset Algos (MAA): Applying Algorithms Beyond the Equities Landscape

As multi-asset trading spreads rapidly through the buy-side trading community, it was inevitable that algorithmic trading solution products would be developed that did not focus on one asset class (equities.) This solution of multi asset algos (MAA) dovetails with the needs of the trading environment. This session addresses the MAA product offerings, challenges in application and who is applying MAA most effectively. Issues discussed include:

- Application, implementation and connectivity development
- Who's using the application
- Challenges faced: Market risk vs. overall performance
- Increased use of algos & DMA solutions

Paul Kessler
Principal
BRISTOL CAPITAL ADVISORS, LLC

3:30 **Buy-Side/Sell-Side Partnerships: Working Together to Attain Optimal Execution with the Application of Strategic Algorithms**

There is a plethora of offerings from the sell-side to the buy-side on algorithmic products. But it is more than just purchasing a product and walking away, it is an establishment of an on-going working relationship so that the product and the sell-side offerings grow with the buy-side's needs. It is a partnership and securing an effective one ultimately results in less stress and more cost efficiency in selection, implementation and on-going review of the product needs for the buy-side trader. This session discusses how to effectively partner to optimize trading execution.

4:00 **Algo/Hedge Fund Strategies: What the Traditional Buy-side Firm can Learn from the Hedge Fund Community's Application of Algorithmic Products**

Historically, the sell-side helped popularize algorithmic trading to cope with decimalization, falling execution sizes, market fragmentation and margin compression. Now, however, the technologically aggressive and performance sensitive hedge fund community is taking the leading role in advancing the technology, design and use of algorithms. This session addresses these issues and others including:

- What is the difference between the applications used by the hedge funds and those implemented by traditional firms? Is the gap narrowing?
- Assessing risk in trading: What we learned from Amaranth and other hedge fund implosions
- ECNs vs. OMS for the hedge fund industry
- Maintaining market lead and anonymity: Which algorithms offer the best results

Timothy Calise
Vice President
APTUS CAPITAL LLC

Daniel Royal
Senior Equity Trader
ARTISAN PARTNERS

Chris Maxmin
Managing Director
MOON CAPITAL LP

4:45 *Day One Concludes*

DAY TWO • WEDNESDAY, APRIL 18, 2007

8:00 *Continental Breakfast*

9:00 **Addressing the Impact of Algorithmic Trading on the Portfolio Managers' Traditional Role**

- Reaching beyond optimal execution with active portfolio management
- Optimal execution vs. algorithm behavior: Bridging the gap
- Addressing material risks facing the portfolio manager, including signaling risk
- How the execution optimization problem should be revised to provide a better representation of actual trading environments
- Solutions to optimal trading strategies that can be implemented

Dan Bienvenue
Portfolio Manager, Global Equity
CALPERS

Paul Ma
Portfolio Manager
AIG SUNAMERICA ASSET MANAGEMENT

9:30 **Keynote Presentation: Examining the Changes in the Algorithmic and Electronic Trading and Market Structure Landscape**

Michael Greenberger
Professor of Law
UNIVERSITY OF MARYLAND
Director
CENTER FOR HEALTH & HOMELAND SECURITY

10:00 *Morning Networking & Refreshment Break*

10:30 **Finding Liquidity in a World of Dark Pools: Buy-Side Algorithmic Solutions for Tapping into Hidden Liquidity**

- Selecting an algorithm that accounts for spread of liquidity
- Addressing the impact of automated markets and algorithms on the liquid trading environment
- Establishing a true evaluation of the product that best suits your organization
- Accommodating buying of smaller, available lots
- Block trading and alternative strategies
- Automation of the markets
- How the consolidation of Exchanges impacts liquidity
- Creating a more seamless low-touch business with algorithmic applications

Nenad Yashruti
Head Trader
FREESTONE CAPITAL MANAGEMENT

Henry Gray
Head of Global Equity Trading
DIMENSIONAL FUND ADVISORS

Jatin Suryawanshi
Managing Director and Head of Algorithmic Trading
UBS

11:00 **What's Next? Evaluating the Next Generation Platforms in Algorithmic Trading Solutions**

- Prediction of future needs
- How the need for split-second reaction to unexpected events is critical in the trading environment
- New offerings which also manage a portion of the investment process
- The use of historical news archives and real-time news feeds into new algorithmic products

Scott Jensen, CFA
Trader
MCF ASSET MANAGEMENT

Paul Farmighetti
Director of Equities Trading
RGM ADVISORS, LLC

11:30 **Examining the Impact of Competition in Market Venues on the Equities Landscape**

Competition among market centers, along with structural and regulatory forces looks to alter the shape of the US equities market in the near future. There are over 20 execution venues currently with NASDAQ and the NYSE currently holding the majority of the market space. But is a shakeout due? This session explores the changes on the horizon including:

- Broker-dealer investments
- Introduction of innovative products and services
- The impact of regional exchanges and alternative trading systems (ATSs)
- Broker internalization and electronic crossing networks

Joe Gawronski
President & COO
ROSENBLATT SECURITIES

Fred Federspiel
President
PIPELINE TRADING SYSTEMS

12:00 **What the Buy-Side OMSs can do in the Face of the EMS Threat**

Electronic trading volumes in equities continues to increase and with that is a growing concern among the buy-side traders over the ability of current order management systems (OMSs) to keep pace with the massive volume of transactions. As a result of the implementation of algorithmic trading, there are thousands of order fills and rapidly increasing real-time data volumes. To secure the ability to cancel and replace orders in a fast market that moves in milliseconds, the buy-side is installing execution management systems (EMSs) alongside their OMSs. As a result, the buy side is beginning to question the future of the traditional OMS. This session takes on issues including:

- The competition for the buy-side trader for the EMS market
- How OMS and EMS differ
- Advantages of EMS
- Integration of real-time data, into an OMS platform
- Convergence and integration of the EMS/OMS product
- Avoiding fat-finger errors
- Multi-broker vs. a broker-neutral model

12:30 Effectively Streamlining Your Trading Operations with the Implementation of Smart Order Routing

- Automatic selection and execution
- Simple and advanced smart order routing
- How will the Exchange consolidation affect smart order routing
- Assessing liquidity

Henry Gray
Head of Global Equity Trading
DIMENSIONAL FUND ADVISORS

1:00 AlgoTrading West Concludes

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