

# Pompano Beach Police & Firefighters' Retirement System

Hilton Tru/Home2 Suites Pompano Beach Pier

May 2 - 4, 2024

## Thursday, May 2, 2024 - Traditional Asset Managers + Hedge Funds

Group Session / Participating Manager	Style / Assignment	Participant(s)	Time
Continental Breakfast			9:00AM
<b>Welcome Session - Introduction &amp; outlook</b>			9:00AM - 9:30AM
Southeastern Advisory	Asset Consultant	Jeff Swanson / Ademir Zeco	
<b>Fixed Income - Higher yields + rate volatility = increased opportunity?</b>			9:30AM - 10:45AM
Insight	Core Fixed Income	Scott Mountain and David Bowser	
Yousif	Core+ Fixed Income	Jim Kelts	
Serenitas	Credit Gamma Fund	David Weeks	
Break			10:45AM - 11:00AM
<b>Domestic Active Equity - Does US Dominance Continue / Where is this great rotation?</b>			11:00AM to 12:30PM
BlackRock	Large Cap Value	Michael Iasello	
Sands Capital	Large Cap Growth	Kevin Murphy	
Allspring	SMID Growth	Dann Smith and Ozo Jaculewicz	
Waycross	Large Cap Core	Chris Grecco	
Lunch			12:30PM - 1:30PM
<b>International Active Equity - King USD and returns / When will EM shine?</b>			1:30PM - 2:45PM
Lazard	International Value	Frank Sposato, Michael Powers, Ben Young	
Renaissance	International Growth	Michael Streitmarter	
Martin Currie	Emerging Markets Equity	Susan Gim	
<b>Hedge Funds - What is the opportunity set going forward?</b>			2:45PM - 3:30PM
Ironwood	Hedge FOF	Bejamin Zack	
Wrap and Break			3:30PM - 4:30PM

## Friday, May 3, 2024 - Alternative Asset Managers

Group Session / Participating Manager	Style / Assignment	Participant(s)	Time
Continental Breakfast			9:00AM
<b>Private Credit - How are inflows changing the risks and opportunities?</b>			9:00AM - 10:30AM
Churchill	Senior Private Credit	Greg Gosch, Lisa George & Laura Stoffi	
Entrust Global	Maritime Credit	Svein Engh and Randy Kinder	
Pennant Park	Private Credit	Art Penn	
Break			10:30AM - 10:45AM
<b>Private Equity - What are the valuation resets for 2024</b>			10:45AM - 12:00PM
Taurus Private Markets	Private Equity FOF	Eric Wilcomes	
Capital Dynamics	Private Equity Specialty	Andrew Bernstein	
Lunch			12:00PM - 1:00PM
<b>Real Estate - More pain ahead or emerging opportunities?</b>			1:00PM - 2:30PM
Cohen & Steers	Public Infrastructure	Brian Casey and Evan Serton	
Invesco	Core US Real Estate	Alex Dodge and Laler Decosta	
TerraCap	Oppty US Real Estate	Nick Vician	
<b>Special Presentation - Alternative Fixed Income</b>			2:30 - 3:30PM
Serenitas	Dynamic Alpha	David Weeks	
Wrap and Break			3:30PM to 4:30PM

## Saturday, May 4, 2024 - Alternative Asset Managers

Group Session / Participating Manager	Style / Assignment	Participant(s)	Time
Continental Breakfast			9:00AM
<b>Board of Trustees</b>			9:00AM - 11:00AM
SEAS Wrap Up / Comments		Jeffrey Swanson	
Business Meeting		Board of Trustees	

The Symposium is for education only.

Asset managers are not to bring product presentations or any hard copy materials

The Board is seeking each session to be a conversation, not a presentation

Casual business attire