

CONFERENCE BOOKLET

13th Annual Conference on Canadian Securities Lending

The Omni King Edward Hotel
Thursday, May 25, 2023



WELCOME



13th ANNUAL CASLA CONFERENCE ON CANADIAN SECURITIES LENDING

CASLA, the Canadian Securities Lending Association, was created with a mission of ensuring the long-term viability of the Canadian securities lending industry by establishing a unified voice. Working with a broad spectrum of direct and indirect industry representatives has fueled a greater and more robust span of expertise and perspectives. The breadth and depth of CASLA is illustrated with the inclusion of external professionals in the legal, tax and regulatory fields, in addition to securities lending market participants. CASLA's unique organizational model builds a strong foundation for the continuing development of the Canadian securities lending market.

WI-FI

NETWORK: Omni Meetings

PASSWORD: kingedward2023

AGENDA

- 8:00 AM **CONFERENCE REGISTRATION & BREAKFAST**
Breakfast sponsored by State Street
- 9:00 AM **WELCOME REMARKS & CONFERENCE OPEN**
Roanna Kim – Director, Equity Finance, RBC Capital Markets and Vice President, CASLA
- 9:05 AM **ECONOMIC UPDATE**
Claire Fan – Economist, Royal Bank of Canada
- 10:00 AM **PANEL 1: INDUSTRY ASSOCIATIONS IN DISCUSSION: THE ROLE OF REPRESENTATION, ADVOCACY AND EDUCATION**

MODERATOR
Kyle A. Kolasingh – Director and Head of Market Services Solutions, RBC Investor & Treasury Services

PANELISTS
Ina Budh-Raja – EMEA Head of Securities Finance Regulatory Strategy & Industry Affairs and Markets ESG, Bank of New York Mellon
Ed Oliver – Managing Director, Product Development, eSecLending
Claire Van Wyk-Allan – Managing Director and Head of Canada, The Alternative Investment Management Association
- 10:30 AM **COFFEE BREAK**
Sponsored by Northern Trust
- 10:50 AM **PANEL 2: THE REGULATORY ENVIRONMENT: PRESENT & FUTURE**

MODERATOR
Erin Lamont – Vice President, Equity Finance, TD Securities

PANELISTS
Nick Chan – Managing Director and Head of Financial Resource Management, BMO Capital Markets
Lesley Charkow – Managing Counsel and Director, Royal Bank of Canada
Tamela M. Merriweather – Senior Vice President and Assistant General Counsel, Northern Trust
Andrea Topic – Director, Regulatory and Optimization, National Bank of Canada

11:30 AM

PANEL 3: PERSPECTIVES ON SECURITIES LENDING

MODERATOR

Chelsea Grossman – North American Head of Agency Lending Client Management, State Street

PANELISTS

Cezan Duong – Head of Canadian Cash Reinvestment, BNY Mellon

Brendan Eccles – Global Head of Securities Lending, Scotiabank

Amin Nathoo – Principal, Anson Funds

Matthew Ross – Associate Director, EquiLend

12:10 PM

LUNCH *Sponsored by JP Morgan*

WORKING LUNCH 1: CASLA & GPFA PRESENTS: BUY & SELL SIDE OPEN FORUM (*WINDSOR BALLROOM*)

MODERATOR

Paul Larkin – Managing Director, CIBC World Markets

PANELISTS

François Bellavance-Lecompte – Senior Director, Equity Replication and Balance-Sheet Activities, PSP Investments

Marco Drumond – Senior Portfolio Manager, Balance Sheet and Treasury Management, Healthcare of Ontario Pension Plan

Dexter Gall – Associate Director, Securities Finance, RBC Investor & Treasury Services

John Loynd – Managing Director, Global Equity Financing and Solutions, BMO Capital Markets

WORKING LUNCH 2: WISF LESSONS FROM THE JUDY PROJECT: NAVIGATING UNCONSCIOUS BIAS (*CRYSTAL BALLROOM*)

Sponsored by Scotiabank

Dr. Sonia K. Kang – Associate Professor at University of Toronto Rotman School of Management

Colleen Moorehead – Special Advisor, Osler Hoskin & Harcourt LLP and Business Co-Director and Founder, The Judy Project

1:30 P M

PANEL 4: JOURNEY TOWARDS T+1

MODERATOR

Keith Evans – Executive Director, Canadian Capital Markets Association

PANELISTS

Ed Corral – Managing Director and Global Head of Collateral Strategy, J.P.Morgan

Ahmed Shadmann – Vice President Head of Agency Lending Trading, Toronto, State Street

Thomas Veneziano – North American Head of Product, Pirum

Mathilda Yared, Managing Director Global Securities Finance, National Bank Financial

2:10 P M

PANEL 5: TMX & CLEARSTREAM MARKET INFRASTRUCTURE DISCUSSION

MODERATOR

Steve Everett – Head Business Strategy and Innovation Post Trade, TMX

PANELISTS

Charles Lesaux – Managing Director, Head Repo Trading Canada, RBC Capital Markets

Laura Klimpel – General Manager of Fixed Income, Clearing Corporation (FICC) & Head of SIFMU Business Development at DTCC

Lara Krivokucho – Chief Commercial Officer, CDCC

Maksym Padalko – Operations and Policy Advisor, Bank of Canada

Fabrice Tomenko – Chief Executive Officer, Clearstream International SA

2:55 P M

COFFEE BREAK

Sponsored by Northern Trust

3:20 P M

KEYNOTE SPEAKER: Dr. Hayley Wickenheiser

Four-time Olympic Gold Medalist Member of the Hockey Hall of Fame

4:20 P M

CLOSING REMARKS

Mary Jane Schuessler – Managing Director, Equity Finance, BMO Capital Markets and President, CASLA

4:30 P M

COCKTAIL RECEPTION

Sponsored by TMX & Clearstream

SPEAKERS



Claire Fan

Economist

Royal Bank of Canada

Claire Fan joined RBC as an economist in 2019 after obtaining her master's degree in financial economics from Western University. She focuses on covering the macroeconomic outlook for Canada and the United States, and is responsible for projecting key indicators including GDP, employment, and inflation. Other topics she has covered include immigration and income inequality.



Dr. Hayley Wickenheiser

Four-time Olympic Gold Medalist
Member of the Hockey Hall of Fame

Seven world championships, six Olympic appearances, five Olympic medals Dr. Hayley Wickenheiser is a titan of sport and a leader both on and off the ice.

A first-ballot Hockey Hall of Fame inductee, Wickenheiser's hockey IQ is highly respected in both the male and female game. She has played in/coached at four NHL development camps with the Philadelphia Flyers, the Edmonton Oilers, and the Toronto Maple Leafs. In 2018, Wickenheiser joined the Toronto Maple Leafs as assistant director of player development in 2018 before being promoted to assistant general manager in 2022.

Alongside her career in the NHL, Wickenheiser is currently a resident medical doctor practicing in the Toronto-area — a pursuit she had dreamt of her whole life and began in 2017 following her retirement from the National Women's Team after 23 years. She is also the author of *Over the Board: Lessons from the Ice*.

In addition, Wickenheiser is a member of the Order of Canada, a retired member of the International Olympic Committee's Athlete's Commission, member of Canada's Sports Hall of Fame, and founder of The Canadian Tire Wickenheiser World Female Hockey Festival.

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For more information, please visit: www.canseclend.com.

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