



Canadian Bond  
Investors' Association

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Association canadienne des  
investisseurs obligataires

**CBIA FORUM  
ON INSIGHT INTO FTSE AND  
ITS IMPACT ON CAPITAL  
MARKETS**

**Thursday, April 30, 2015  
3:00 PM Eastern  
Royal York Hotel, Toronto**

# FORUM ON INSIGHT INTO FTSE AND ITS IMPACT ON CAPITAL MARKETS

THURSDAY, APRIL 30, 2015 AT 3:00 PM EASTERN  
UPPER CANADA ROOM 18<sup>TH</sup> FLOOR, FAIRMONT ROYAL YORK HOTEL  
100 FRONT STREET WEST, TORONTO

## PROGRAM

2:30 – 3:00 PM      Registration

3:00 – 5:00 PM      **FTSE and its Impact on Capital Markets**

In Q1 2013, FTSE TMX Capital Debt Markets was formed through a JV partnership between TMX Datalinx (former PC-Bond) and FTSE Group, and operates as a subsidiary of FTSE International Ltd. The session will provide a brief history of FTSE TMX and the evolution of index methodology. We will discuss developments since the partnership with FTSE and the outlook for the Canadian bond indices. The panel is intended to add perspective from various users of FTSE TMX bond indices, opening discussion on best practices, common concerns, how index methodology may impact portfolio construction and developing trends.

5:00 – 6:00 PM      **Networking Reception**

A casual networking opportunity with CBIA members and other key industry leaders.

## SPEAKERS



**Basil Czopyk, CFA**  
**Director of Corporate Bond Trading and Distribution, TD Securities**

Basil is a Director of Corporate Bond Trading and Distribution, managing the energy/infrastructure/utility sector with TD Securities. Basil has over 10 years' experience trading corporate bonds and is past Chair of the Toronto Bond Traders Association. He earned a Bachelor of Arts in Economics and has his CFA credential.



**Bill Girard, CFA**  
**Vice President and Portfolio Manager, 1832 Asset Management L.P.**

Bill is responsible for credit investments, including preferred shares, across all managed client portfolios on the Scotia fixed income team. In 1994, Bill joined the fixed income team at Scotia Investment Management, a predecessor firm, where he established a successful track record in value-added trading, research and portfolio management. This led him into successively more senior positions within the firm. Bill holds a Bachelor of Science and a Bachelor of Commerce degree from the University of Windsor, as well as a Master of Business Administration from the University of Miami, graduating Beta Gamma Sigma. Bill is a CFA Charterholder and is a past director of the Toronto CFA Society.



**Erwan Pirou, CFA**  
**Canadian Head of Fixed Income Research, AON Hewitt**

Erwan leads the Canadian fixed-income research team at Aon Hewitt and plays a crucial role in supporting the Investment Consulting practice. He joined the practice in 2007. Erwan specializes in investment manager research, with a particular focus on fixed income and liability-driven investments. He researches a wide range of fixed income products from Canadian bonds to global and high yield bonds. He also has experience of structuring solutions with derivatives. Before joining Aon Hewitt in 2007, Erwan was a credit analyst at Barclays, assigned to the telecommunications and utility sectors, and served as a fixed-income security portfolio co-manager. He was previously a quantitative analyst at Barclays Private Bank. Erwan has a Master's degree in corporate finance from Université de Rennes (France). He holds the designation of Chartered Financial Analyst (CFA) and has 15 years of experience in the field of finance.



**Marina Mets, CMA CPA**  
**Director Fixed Income, FTSE TMX Global Debt Capital Markets (PCBond)**

Marina is responsible for managing the Canadian Fixed Income product suite which includes indices, valuation, and software analytics. In this role, Marina works closely with research & analytics, as well as partners and key clients, to develop and broaden FTSE's bond index offering. Marina has been with the Fixed Income Index business in Canada since 2001, starting her career at Scotiabank Capital Markets, and continuing on with the PCBond business through its acquisition by TMX Group in 2006. Marina joined FTSE TMX which combined the fixed income businesses of FTSE and TMX Group in 2013. Marina holds a Bachelor of Commerce from the Rotman School of Management at the University of Toronto, and is a CPA CMA.

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APRIL 30, 2015  
REGISTRATION FORM – Non-Members**

**FIRM NAME** \_\_\_\_\_

**1st ATTENDEE NAME** \_\_\_\_\_  
(to appear on badge)

**Tel.:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-mail (required):** \_\_\_\_\_

**2nd ATTENDEE NAME** \_\_\_\_\_  
(to appear on badge)

**Tel.:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-mail (required):** \_\_\_\_\_

**3rd ATTENDEE NAME** \_\_\_\_\_  
(to appear on badge)

**Tel.:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-mail (required):** \_\_\_\_\_

**4th ATTENDEE NAME** \_\_\_\_\_  
(to appear on badge)

**Tel.:** \_\_\_\_\_ **Fax:** \_\_\_\_\_ **E-mail (required):** \_\_\_\_\_

**Registration Fee:** \$65.00 + \$8.45 HST = ~~XXXXXXXXXX~~ ^! /acc } â^^ XXX = ~~XX~~ ' ' \_\_\_\_\_

**Payment Options**

**Cheque**  
Please make cheque payable to the Canadian Bond Investors' Association (CBIA) and return a copy of this registration form, with your cheque, to:  
**Canadian Bond Investors' Association, 20 Carlton Street, Suite 123, Toronto, ON, M5B 2H5**

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**Credit card #:** \_\_\_\_\_

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Complete credit card details and fax back to the CBIA office at (416) 585-3005 or email it to [info@bondinvestors.ca](mailto:info@bondinvestors.ca). Please feel free to contact Jane Will at (416) 585-3000 to provide credit card details.

HST: All registration cheques/money orders must include HST. HST-exempt firms will have to claim the HST as an Input Tax Credit (ITC). Registrations will NOT be accepted without HST and cheques will be returned. (CBIA HST # 833494081)