

Options Industry Conference 2019

Agenda

Tuesday, April 30, 2019

2:00 - 6:00 p.m.

Registration Welcome Reception

Wednesday, May 1, 2019

8:00 a.m. - 6:00 p.m.

Registration

8:00 a.m. - 12:30 p.m.

Golf Outing – Blue Monster at Trump Doral

8:30 - 11:30 a.m.

Tennis Clinic- Trump Doral Tennis Center

1:00 - 2:00 p.m.

SIFMA Listed Options Trading Committee Meeting - By Invitation

1:00 - 3:00 p.m.

OIC Roundtable Meeting - By Invitation

2:00 - 3:00 p.m.

STA Listed Options Committee - By Invitation

2:30 - 6:30 p.m.

Attendee Lounge Open

3:00 – 3:05 p.m.

Welcome & Opening Remarks

3:05 – 4:00 p.m.

Exchange and Industry Updates

Joe Bracco, Senior Vice President, Head of Sales, MIAX

Jim Toes, President & CEO, Security Traders Association

Ellen Greene, Managing Director, SIFMA

Julie Bauer, Executive Vice President, Government Relations and Investor Education, OCC

Amy Lawson, First Vice President, Product Development, OCC

Mary Savoie, First Vice President, Investor Education, OIC

Paul Kenyon, Head of Sales and Relationship Management, New York Stock Exchange

Tanya Patwa, Managing Director, U.S. Options, Nasdaq

John Palmer, Sr. Director, Head of Multi-listed Options, Cboe Global Markets

Patty Schuler, Vice President, Business Development, BOX Options Exchange

4:00 - 4:20 p.m.

OIC Academic Study on the Impact of Options Strategies on Endowments

This OIC sponsored study will be presented by **Edward Szado, Ph.D., CFA®**, Assistant Professor at Providence College, the Director of Research of the Institute for Global Asset and Risk Management (INGARM).

4:20 - 5:10 p.m.

Volatility as an Asset Class

Leading volatility traders and product experts come together to discuss the outlook for trading volatility post 2018.

Sponsored by: **Citadel Securities**

Moderator: **Ben Londergan**, Managing Director of Strategic Relationships, Peak6

Panelists:

Simon Ho, Chief Executive Officer, T3 Index

Michael Palmer, DPM-Specialist, VIX Options, Group One

LT Tanzman, Head of CES Options Routing, Citadel Securities

5:10 – 6:30 p.m.

Attendee Lounge Grand Opening Reception

6:30 – 9:30 p.m.

Welcome Dinner

With the Blue Monster golf course providing a beautiful backdrop, our first night offers an opportunity to dine and network under the stars.

9:30 p.m.

Conference After-hours

Thursday, May 2, 2019

7:00 a.m. - 12:30 p.m.

Registration

7:00 a.m. - 12:30 p.m.

Attendee Lounge Open

7:00 - 7:55 a.m.

Breakfast in Attendee Lounge

7:55 - 8:00 a.m.

Welcome & Opening Remarks

8:00 - 8:45 a.m.

Option Entrepreneurs: Small Shops Making a Big Bang

A discussion with modern day business visionaries growing the options business in very different ways.

Sponsored by: **OptionsPlay**

Moderator: **Eric Cott**, Director Education, OIC

Panelists:

Matthew Amberson, Principal, Option Research and Technology Services

Ryan Belanger-Saleh, Co-CEO and Founder, Gatsby

Tony Zhang, Chief Strategist, OptionsPlay

8:45 - 9:00 a.m.

State of the Industry - Henry Schwartz

A deep dive into trading and market trends based on volume. What customers are doing, when and where.

Presented by: **Henry Schwartz**, Founder and President, Trade Alert, LLC

9:00 - 9:15 a.m.

State of the Industry - Andy Nybo

The results of the most recent market structure survey will be shared along with insight and most current views of industry topics.

Presented by: **Andy Nybo**, Director, Burton-Taylor International Consulting

9:15 - 10:00 a.m.

Industry Leaders Panel

A dynamic interchange with heads of the industry.

Sponsored by: **Devexperts**

Moderated by: **Andy Nybo**, Director, Burton-Taylor International Consultants

Panelists:

Ivan Brown, Head of Options, New York Stock Exchange

Shelly Brown, Executive Vice President, Strategic Planning and Operations, MIAX

Arianne Criqui, SVP, Head of Options & Business Development, Cboe Global Markets

Greg Ferrari, Vice President, Head of U.S. Options, Nasdaq

John Fennell, Executive Vice President & Chief Risk Officer, OCC

Patrick Zielinski, Senior Vice President, Trading Operations & Technology, Box Options Exchange

10:00 - 10:30 a.m.

Snack Break in Attendee Lounge

10:30 - 11:00 a.m.

OCC Fireside Chat

John P. Davidson, Chief Executive Officer, OCC will be interviewed by **Russell Rhoads**, Head of Derivatives Research, TABB Group / Adjunct Professor at Loyola University, Chicago.

11:00 - 12:00 p.m.

Legends of Trading

Thomas Peterffy, Chairman and Founder of Interactive Brokers Group, Inc and **Blair Hull**, Founder, Hull Trading Company talk about where it all began and more.

12:00- 12:45 p.m.

Keynote Speaker - Governor Jeb Bush

12:30 - 1:30 p.m.

Listed Options Market Structure Working Group - By Invitation

1:00 - 4:30 p.m.

Networking/Cabana Event – Royal Palm Pool

6:30 p.m.

Depart for Exchange Dinner

7:00 - 10:00 p.m.

Exchange Dinner – Offsite

We will travel to The Deck at Island Gardens, in the heart of Biscayne Bay, which offers unrivaled views of Miami and beyond.

10:00 p.m.

Conference After-hours

Friday, May 3, 2019

7:00 a.m. - 12:30 p.m.

Registration

7:00 a.m. - 12:30 p.m.

Attendee Lounge Open

7:00 - 8:00 a.m.

Breakfast in Attendee Lounge

8:00 - 9:00 a.m.

Exchange Clearing and Risk 2019

Leading clearing and risk experts join together to discuss the challenges of being a clearing firm in today's volatile markets.

Sponsor: **Sterling Trading Tech**

Moderator: **Steve Crutchfield**, Head of Market Structure, CTC Trading Group, LLC

Panelists:

Alicia Crighton, COO Options, Futures and OTC Clearing Businesses, Goldman Sachs

Mike Dennis, U.S. Head of Relationship Management, ABN Amro Clearing Chicago, LLC

Frank Magnani, Global Institutional Sales, Interactive Brokers Group, LLC

Kevin McCarthy, Head of Professional Clearing, Bank of America Merrill Lynch Global Markets

9:00 - 10:00 a.m.

Institutional Execution and Liquidity

Discussion of leading execution firms who are changing how institutional liquidity is being found and executed today. The discussion will focus on how these Routing & Execution Brokers are filling a critical role in price discovery and bringing buyers and sellers together in multiple ways.

Sponsor: **Miami Downtown Development Authority**

Moderator: **Kevin Murphy**, Corporate Relationship Manager, Hamilton Executions, LLC

Panelists:

Annabelle Baldwin, Partner, SpiderRock

William "Duke" Ellington, Managing Partner, XFA

Tommy Martin, Managing Director, Head of Sales Strategy & Operations, Dash Financial Technologies

Craig Reilly, Director of Sales, Volant Execution

10:00 - 10:30 a.m.

Snack Break in Attendee Lounge

10:30 - 11:15 a.m.

Featured Speaker - Anthony Scaramucci

Fireside chat with **Anthony Scaramucci**, Founder & Co-Managing Partner, Skybridge Capital
Hosted by: **Robert Castrignano**, Principal, Sandler O'Neill and Partners.

11:15 - 12:30 p.m.

U.S. Options Industry Lifetime Contribution Awards

Join us as we acknowledge the options industry's unsung heroes.

12:30 - 12:45 p.m.

Passing of the Hammer

12:45 - 12:50 p.m.
Closing Remarks

1:30 – 4:30 p.m.
Optional Event – Rick Smith Golf Performance Center

7:00 -10:00 p.m.
Farewell Celebration

Say goodbye to another Options Industry Conference at our Farewell Celebration, honoring the Crowd of Fame inductees.