

# 2026 Options Industry Conference®

## Agenda

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**Tuesday, May 5, 2026**

**3:00 – 3:05 p.m.**

Welcome and Opening Remarks

**3:05– 3:15 p.m.**

OCC Welcome: Dan Bussy, Chief Operating Officer, OCC

**3:15 – 4:00 p.m.**

Fireside Chat with SEC Director of Trading and Markets Jamie Selway

Steve Luparello, Chairman, OCC will lead a fireside chat with **Jamie Selway**, Director of Trading and Markets, U.S. Securities and Exchange Commission

**4:00 p.m. – 4:45 p.m.**

State of the Industry

The options tape is noisy. Intraday volatility cycles, ODTE reflexes, ETF-driven options growth, and increasingly granular expiration schedules are reshaping how liquidity forms, migrates, and occasionally disappears. This session examines where activity is truly concentrating across index and single-stock products, including the continued expansion of daily expirations into select equities, and how that evolution is influencing spreads, hedging behavior, market-maker capacity, and risk transfer.

**Moderator: Henry Schwartz**, Vice President, Market Intelligence, Cboe Global Markets

**Panelists:**

**Annabelle Baldwin**, Chief Revenue Officer, SpiderRock

**Shelly Brown**, Executive Vice President, Chief Strategy Officer, MIAX

**Geralyn Endo**, Head of Options Business Development, MEMX

**Wednesday, May 6, 2026**

**9:00 – 9:45 a.m.**

Retail 3.0: Rise of the Self-Directed Quant

The options market is entering a new era. Quantitative strategies are no longer confined to institutional desks – they're being deployed by a new class of self-taught, tech-enabled participants leveraging data analytics, APIs, and algorithmic execution. This panel explores how this shift is reshaping intermediation, liquidity, and education.

**Moderator: Jermal Chandler**, Head of Options Strategy, tastylive

**Panelists:**

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**Jessica Inskip**, Director of Investor Research, Stockbroker.com

**Brent Kochuba**, Founder, SpotGamma

**Steve Quirk**, Chief Brokerage Officer, Robinhood

**9:45- 10:30 a.m.**

### **Volatility as an Asset Class: Evolving Strategies in the Options Market**

Volatility has moved beyond a pricing input to become a tradable, investable asset class. This panel will explore how options professionals are harnessing volatility for trading, hedging, and portfolio diversification, with insights into the latest products, strategies, and market trends.

**Moderator: Steve Sosnick**, Chief Strategist, Interactive Brokers

#### **Panelists:**

**Ben Londergan**, Managing Director Strategic Business Development, Simplex Trading

**Kevin McCarthy**, Managing Director and Head of Market Maker Financing and Clearing , Wells Fargo Securities

**Nate Pomeroy**, Principal, Wolverine Trading Technologies

**11:00 a.m. – 12:00 p.m.**

### **Keynote Speaker: Cassie Kozyrkov**

CEO of Kozyr, AI Luminary, Former Chief Decision Scientist at Google, and Pioneer of Decision Intelligence

Cassie Kozyrkov, CEO of Kozyr, is a renowned leader in artificial intelligence. She is best known for founding the field of Decision Intelligence and serving as Google's first Chief Decision Scientist, where she led the charge in Google's transformation into an AI-first company

**1:00 – 1:45 p.m.**

### **From Vision to Execution: A Buyside-Sellside Dialogue on Market Evolution**

Instead of siloed perspectives, this session pairs buyside and sellside leaders to tackle pressing industry questions collaboratively:

- Which trends will shape the next 12–24 months?

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- How are vendors and exchanges prioritizing innovation?
- What role can buy-side firms play in shaping product development and liquidity frameworks?

**Moderator: Ivan Brown**, Head of Options, IEX

**Panelists:**

**John Ruby**, Trader, Jane Street

**Andy Hicks**, Option Strategist, BlackRock

**Tommy Martin**, Chief Strategy Officer, DASH Financial Technologies

**Anthony Denier**, Group President and U.S. Chief Executive Officer, Webull

**1:45 – 2:30 p.m.**

### **No Closing Bell: Reimagining Options in a Continuous Market**

The prospect of 24/7 trading for U.S. listed options is no longer a thought experiment—it's an industry conversation already underway. But turning the lights on around the clock is not as simple as flipping a switch. It requires rethinking clearing, collateral, and risk management frameworks; redefining the trading day itself; and ensuring that liquidity, market depth, and investor protections hold up during non-traditional hours.

**Moderator: Aniceto Solares**, Principal, Regulatory Policy, OCC

**Panelists:**

**Dave Barrett**, Head of U.S. Options, Nasdaq

**Kevin Tyrrell**, Vice President, Head of Markets, NYSE: ICE

**Alicia Crighton**, Managing Director, Goldman Sachs

**Adam Leaman**, Chief Commercial Officer, Zerohash

## **Thursday, May 7, 2026**

**9:30 – 10:15 a.m.**

### **Institutional Innovation: Derivative-Based ETFs and the Role of FLEX Options**

Institutions are increasingly using derivative-based ETFs and FLEX Options as complementary tools to achieve precise risk-return outcomes. This panel will explore how products such as buffer and target outcome ETFs, hedged equity structures, and single-

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name/high-payout ETFs are reshaping institutional allocation models – and how FLEX Options provide the customization needed to support these strategies.

**Moderator: Sara Levin**, Managing Director, ETF and Derivative Trading, WallachBeth Capital

### Panelists:

**Sean Truett**, Senior Vice President of Strategy & Business Development, Box Options Market LLC

**Geoff Gaiss**, Vice President Global Derivatives, TRAFIX

**Burke Ashenden**, Head of Capital Markets & Institutional Strategy, Innovator

**James Maund**, Head of Capital Markets, Krane Shares

**10:45 – 11:45 a.m.**

### Event Contracts, Crypto, and the Intersection of Regulation

Event contracts and digital asset derivatives are emerging under CFTC oversight, while listed options and ETFs remain SEC-regulated. Meanwhile, some platforms are offering both. This panel will examine:

- The SEC and CFTC frameworks and their implications for innovation.
- Whether event contracts should be viewed as gaming, financial hedging, or a hybrid.
- How crypto-linked options and ETFs fit into the regulatory patchwork.
- What market participants need to prepare for as regulatory convergence (or conflict) plays out.

**Moderator: The Honorable Dawn D. Stump**, Principal, Stump Strategic

### Panelists:

**JJ Kinahan**, Senior Vice President, Head of Retail Expansion and Alternative Investment Products, Cboe Global Markets

**Ryan Jachym**, Global Head of Markets Policy in the Office of Government and Regulatory Affairs, Goldman Sachs

**Summer Mersinger**, Chief Executive Officer, Blockchain Association

**Thomas Plummer**, Prediction Markets, Jump Trading