

# 2024 Options Industry Conference®

## Agenda

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**Tuesday, April 30, 2024**

**3:00 – 3:10 p.m.**

Welcome and Opening Remarks

**3:10 – 3:15 p.m.**

Virtual Welcome Address: The Honorable Patrick McHenry (R-NC) Chairman, U.S. House Financial Services Committee

**3:15 – 3:30 p.m.**

OCC Renaissance Update

Mike Hansen, Chief Clearing and Settlement Services Officer, OCC

**3:30 p.m. – 4:15 p.m.**

State of the Industry

Henry Schwartz, Vice President, Global Head of Client Engagement, Cboe Global Markets

**4:15 – 5:00 p.m.**

Market Landscape: Where We Are and What is Next

The macroenvironment and the state of the U.S. economy will be among the key topics in this overview of both the current market and what may be on the horizon.

**Moderator: Stacey Gilbert**, Chief Investment Officer, Glenmede Investment Management

Panelists:

Meaghan Dugan, Head of Options, NYSE

Steve Sosnick, Chief Strategist, Interactive Brokers

Patrick Zielinski, Chief Executive Officer, BOX Options Exchange

**Wednesday, May 1, 2024**

**9:00 – 9:45 a.m.**

Volume Forecast: Is 10 Billion Your Bid or Offer?

Amid the ongoing increase in options volume, a host of issues and opportunities remain, including the potential for international growth, educating investors and questions about the role of AI.

**Moderator: Steve Crutchfield**, Head of Business Development, Chicago Trading Company

Panelists:

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Chris Larkin, Managing Director, Head of Trading and Investing, E\*TRADE from Morgan Stanley

Joe Mazzola, Director, Trading & Education, Charles Schwab & Co

Greg Stevens, Vice President, Fidelity Investments

**9:45– 10:30 a.m.**

### Engaging Today's Investor: Are We Evolving With Them?

The investor paradigm is shifting. To meet buyers and sellers where they are, the markets and exchanges have to adapt.

**Moderator:** JJ Kinahan, Chief Executive Officer, IG North America

#### Panelists:

Johnathan Hampton, Director of New Sales and Partnerships, Exegy

Jessica Inskip, Director of Education and Product, Options Play

Steve Quirk, Chief Brokerage Officer, Robinhood Markets, Inc

**11:00 a.m. – 12:00 p.m.**

**Keynote Speaker:** Rorke Denver, Navy Seal Commander (RET.), Leadership & Peak Performance Specialist

**1:00 – 1:45 p.m.**

### Behind the Curtain: A Buy Side Conversation

Hear directly from top investment managers about their worries, their views on where the growth is, and whether they're putting listed options, including ODTEs, to work.

**Moderator:** Joe Lewis, Head Corporate Hedging & FX Solutions, Jefferies

#### Panelists:

Eric McArdle, Managing Director, Advisor Solutions, Simplify

Blake Dinger, Portfolio Manager, SpiderRock Advisors

Megan Morgan, Head of Market Structure, Belvedere Trading

**1:45 – 2:30 p.m.**

### Perspectives and Proposals From Inside The Beltway

This session will center on how the market may be affected by regulatory developments and Federal Reserve decisions.

**Moderator:** Steve Luparello, Principal, Gaillard Group LLC

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### Panelists:

Gregg Berman, Managing Director, Market Analytics and Regulatory Structure, Citadel

Mark Davies, Chief Executive Officer, S3

Jill Sommers, Chair of the Derivatives Practice Group, Patomak Global Partners

### Friday April 28, 2023

8:30 – 9:15 a.m.

#### The Options Trailblazers Pushing the Boundaries of Innovation

In the derivatives space, the ability to innovate is non-negotiable. Learn what new paths are being forged in equities, ETFs and digital transformation.

**Moderator:** Lule Demmissie, Chief Executive Officer US, eToro

### Panelists:

Geralyn Endo, Relationship Manager, Options Lead, MEMX

Kevin "Lex" Luthringshausen, Senior Vice President, Chief Content Officer, Tradier Inc, Tradier Hub

Laura Morrison, ETF/Investment Industry Advisor, Former Chief Revenue Officer, Direxion

9:15 – 10:00 a.m.

#### Volatility on the Ballot? Navigating the Markets During an Election Year

The 2024 election season could dramatically impact finance and investing. This session will cover what is known – and how to prepare for the unknowns.

**Moderator:** Ellen Greene, Managing Director, Equity and Options Market Structure, SIFMA

### Panelists:

Dennis Davitt, Chief Investment Officer, Millbank Dartmoor Portsmouth

Geoff Gaiss, Vice President, Global Derivatives, TRAFIX

Jim Toes, President and Chief Executive Officer, Security Traders Association

10:30 – 11:15 a.m.

#### Exploring Global Opportunities: Understanding the Dynamics of International Options Markets

Dive into an insightful exploration of the distinctions between the US and European options markets in this engaging session. Delve into the repercussions and investment prospects

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stemming from the escalating trading activity flowing from Europe to the US. Uncover the driving forces behind the burgeoning retail sector in Europe and gain valuable foresight into forthcoming market trends.

**Moderator:** David Cross, Co-Head of Options, DASH Financial Technologies

**Panelists:**

Lauren Arbid, Director, US Head of Relationship Management, ABN AMRO Clearing USA LLC

Mathieu Boivin-Carrier, Director, All Options USA

James Putra, Vice President and Head of Product Strategy, TradeStation

Dr. Randolph Roth, Member of the Executive Boards, Eurex

**11:15 a.m. – 12:00 p.m.**

**Embedded Optionality: Shaping the Future of the Industry**

Industry panelists will discuss exchange operations, the state of competition, the return of floor trading and resiliency for the next 50 years.

**Moderator:** Paul Jiganti, Managing Director, Business Development & Market Structure Strategy, IMC

**Panelists:**

Andrej Bolkovic, Chief Executive Officer, OCC

Shelly Brown, Executive Vice President, Strategic Planning and Business Development, MIAX

Sean Feeney, Head of US Options, Nasdaq

Kevin McCarthy, Chief Administrative Officer and Head of Clearing, Clear Street