

# Foreign Exchange TradeTech

The Premier Institutional Foreign Exchange Trading Summit

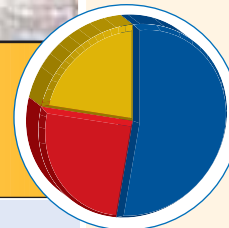
2009

February 9-11, 2009 • Bridgewater, At The South Street Seaport, NYC

[www.tradetechforeignexchange.com](http://www.tradetechforeignexchange.com)


## Adapt Your Trading Desk To Evolve With The Changing Dynamics Of The FX Marketplace

### Who Will Attend




- 53% Buy-Side
- 26% Trading Platforms & Others
- 21% Sell-Side

### Presenting Buy-Side Leaders Include:

 James F. Lubin  
Principal & Director  
**Hyman Beck & Co., Inc.**

 Erik Postnieks  
CEO & CIO  
**Wooster Asset Management, LLC**

 Mark Rzepczynski  
Managing Partner  
**Lakewood Partners**

 Momtchil Pojarliev  
Head of Currencies  
**Hermes Fund Managers Limited**

### Special Guest Speaker:

 Daniel S. Shaffer,  
CPA, ChFC  
President & CEO  
**Shaffer Asset Management, Inc.**  
*Industry Expert On  
Fox Business Network*

**87.7% New Speakers Including:**

IPM Informed Portfolio Management  
Morgan Stanley  
Hyman Beck & Co., Inc.  
Lakewood Partners  
Wolverine Trading LLC  
Quaesta Capital  
CalPERS  
Aite Group  
Tactical Group Holdings LLC  
Nantucket Hedge Fund & CTA Program  
QFS Asset Management  
Aspen Trading Group  
Stern School of Business, NYU  
Standard Chartered Bank  
Hermes Fund Managers Limited  
Plimsoll Capital  
BMO Capital Markets  
Goldman Sachs Asset Management  
Wooster Asset Management, LLC  
Infinium Capital Management  
Abacus Fund Management

### New FX Re-Fresh

Monday, February 9th, 2009

- ✓ Gain successful strategies to hedge international investments using FX
- ✓ Best practices to managing your FX trades to maximize profitability
- ✓ Transition your successful equity strategies to FX

### Maximize Your Profitability In 2009 By:

- Defining benchmarks and metrics for FX execution to set standards and investor expectations
- Benchmarking currency hedge fund returns to extrapolate superior performance
- Identifying the value of an algo to optimize your investment and track progress
- Analyzing risk control strategies to avoiding large, rapid drawdowns
- Evaluating the future of liquidity and banks ability to support online trading

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## What FX Traders had to say about TradeTech Foreign Exchange

*I like the conference due to it's richness in FX trading topics. Many topics can be useful for developing a future FX trading platform.*

– Eric Huynh, Programmer/Analyst, **The Capital Group Companies**

*Excellent mix of material well suited for traders across the entire FX space from manual spot traders & forwards, to sophisticated swaps and algo trading, to systems and technology. The biggest value comes from brainstorming round-table discussions*

- Leo Hmelnitsky, Trader, **AXA Rosenberg**

*TradeTech FX offered a rare and insightful look at the advantages and challenges of Algorithmic FX trading. Anyone interested to know who is at the cutting edge of programmatic e-FX trading and specifically how they operate should not miss this conference.*

- Josh Levy, Managing Director, **Tactical Asset Management LLC**

*TradeTech FX provides a great platform for the exchange of ideas and knowledge addressing hot issues faced by the FX industry today*

- Socrates Ioannidis, Director of Research, **Hyman Beck & Company**

*The information exchanged at TradeTech FX was valuable for us as a buy-side firm and ultimately for our investors.*

- Randy DuRie, Portfolio Manager, **Plimsoll Capital**

## Who Will You Meet At TradeTech Foreign Exchange 2009:

### Buy-Side FX

#### Heads of:

- Foreign Exchange Trading
- Global FX
- Fixed Income and Currency
- Currency Overlay
- Treasury
- FX Risk
- Options
- Currency Risk Management
- Currency and Equity Derivative
- Investment
- Operations
- Fund Management
- Pension & Endowment Funds

### Sell-Side FX

#### Heads of:

- FX Dealing
- FX Sales
- Global FX Electronic Trading Services
- Financial Markets eCommerce
- Spot and Forward Trading
- Currency Strategist
- Financial Markets
- Portfolio Strategy
- Connectivity
- European Rates
- US Rates
- Prime Trade
- FX Spots & Options

## FX RE-FRESH

Monday, February 9th, 2009

If you are investing internationally, you must consider the FX risks and opportunities. Register for this one day seminar and ensure successful transition of best practices from equities and commodities to the vastly profitable FX market.

9:30 **Conference Registration & Continental Breakfast**

10:00 **Chairperson's Opening Address**

10:15 **KEYNOTE: Managing Your FX Trading In The Changing Dynamics Of The Market Place**



Daniel S. Shaffer, CPA, ChFC  
President & CEO  
**Shaffer Asset Management, Inc.**

**Dan is a frequent  
commentator for Fox  
Business Network**

- Examining estimated volume of FX being traded by equity traders and CTAs

- Identifying the drivers that are changing current FX market
- Breaking down most common strategies used by traders and how they evolved
- Exploring the impact of correlation changes of FX v. non-FX to improve your trading

10:55 **PANEL: Defining Best Practices To Effectively Translate Best Execution Strategies From Equities To Forex**



Dave Floyd  
Founder, Head Trader  
**Aspen Trading Group**

**For updates on panelists please see  
[www.tradetechforeignexchange.com](http://www.tradetechforeignexchange.com)**

11:30 **Lunch For All attendees**

12:30 **Examining The Role Of Currency As An Asset Or As Part Of Trading Another Asset Class**



Igor Yelnik  
Director, Portfolio Manager

**IPM Informed Portfolio Management**

- Understanding investors' view on currency investments: Is it an asset class or a residual of investing internationally?
- Examine the impact of these perceptions on your portfolio investment to avoid misdirecting your investments and tracking market movements
- FX in fund of fund portfolio: Should it be a direct investment or as part of an overlay?

1:05 **PANEL: Evaluating Algo Trading Used In FX Today To Successfully Transition Into This MarketSpace**

Randy Durie  
Principal  
**Plimsoll Capital**

Sang Lee  
Managing Partner  
**Aite Group**

- Examining popularity of execution-based algos to successfully transition best practices to the FX market
- Exploring changing market dynamics that are driving the increased trading volumes
- Assessing the changing make-up of client segments as it applies to integrating algo into your trading strategy

- Analyzing the impact of increased algorithmic trading in back-office processing
- Understanding the evolving role of FX ECNs: What are the different features that are necessary for successful trades?

1:45 **Roundtable Discussion – Ideas Xchange**

Discuss debate and drill down the various concepts presented in the day to ensure you **walk away with profit generating ideas to improve your trading desk**. Take this opportunity to actively participate in small group discussions that ensure you share and gain best practices on the following topics:



3:00 **Closing Remarks And End Of Focus Day**

# MAIN CONFERENCE DAY ONE

## Tuesday, February 10th, 2009

8:15 **Conference Registration & Continental Breakfast**

9:00 **TradeTech Foreign Exchange Welcome Address**



Victoria Roginskaya  
Executive Director  
**TradeTech FX 2009**

9:05 **Chairperson's Opening Address**

9:20 **KEYNOTE PANEL: Analyzing Current Volumes Of Cash Market V. Futures Market To Optimize Your "Options"**

Herm Viguerst  
Head FX Options  
**Infinium Capital Management**

For updates on panelists please see  
[www.tradetechforeignexchange.com](http://www.tradetechforeignexchange.com)

- Defining the relationships between cash and options to identify when one aligns with your goals
- Assessing the viability of converting options to cash for short term trading
- Evaluating the impact of current growth in options trading in the FX market
- Developing an integrated strategy that will diversify your portfolio to minimize risk while maximizing returns

10:00 **Executing Quality And Transaction Cost Analysis Successfully By Contrasting Centralized And Decentralized Markets**



Mark S. Rzepczynski  
Managing Partner  
**Lakewood Partners LLC**

- Identifying relevant goals and benchmarks for FX execution metrics to set standards and investor expectations
- Extrapolating research from microstructure markets to develop applicable practices and lower execution costs
- Isolating useful algorithms for execution minimization
- Setting realistic goals in an opaque market to ensure cost effective execution

10:35 **PANEL: Examining Correlated Asset Classes That Affect Currency Hedging**

George V. Marcus  
President  
**Nantucket Hedge Fund & CTA Program**

Emil van Essen, CTA  
Principal and Trader  
**Abacus Fund Management**

- Examining the trends in commodities especially oil and gold as it relates to the USD

- Identifying viable asset classes where hedging is possible due to correlation
- Monitoring the market constantly to avoid getting hit by speculators generating market signals
- Assessing trends in commodities that have isolated effects on currency and increase your investment there to maximize your portfolio
- Analyzing the impact of the entry of traders from other classes into the FX space on the market dynamics

## 11:15 Morning Break & Opportunity to Network

### 11:45 Benchmarking Currency Hedge Fund Returns To Identify Superior Performance

Richard M. Levich  
*Professor, Finance and International Business*  
**Stern School of Business, New York University**

- Selecting a benchmark for currency fund managers to track performance
- Examining style factors and risk factors as they impact fund returns
- Identifying alpha seekers and beta chasers to differentiate value-added versus mimicking strategies
- Analyzing how the benchmark selection impacts performance to distinguish high versus low rankings

### 12:20 Analyzing Style Differences Of Currency Fund Managers: Gaining Best Practices To Survive In Today's Currency Markets

 Momtchil Pojarliev  
*Head, Currencies*  
**Hermes Fund Managers Limited**

- Examining factors which explain returns of currency funds to gain insights of the risk and return characteristics of currency management
- Analyzing the effects of carry trade on performance of currency traders to gain insights about prudent portfolio construction
- Outlining strategies to minimize business risk of currency managers by evaluation style differences between funds that survive and funds that do not
- Testing for style and performance persistence among currency managers to gain insights for manager selection

## 12:55 Lunch For All Attendees

### 1:55 BUY SIDE/SELL SIDE PANEL: Assessing Market Liquidity – What is Needed And What Is Offered?

Josh Levy  
*Managing Director*  
**Tactical Group Holdings LLC**

 Ed Solari  
*Managing Director*  
**BMO Capital Markets**

Armin Tobaccowala  
*Vice President, FX Sales*  
**Morgan Stanley**

- Examining the growing need for liquidity by buy side money managers
- How does the growing FX traded volumes affect the availability of liquidity?
- Understanding the role of banks in dealing with the fragmented market and their position on electronic demands for liquidity
- Evaluating the growing counterparty risk - How do the banks plan to address these issues?

### 2:35 PANEL: Leveraging Economic Trend Analysis To Identify The Next Hot Opportunity In The Emerging Markets

 Keith Underwood  
*Regional Head, FX Financial Markets, Americas*  
**Standard Chartered Bank**

For updates on panelists please see  
[www.tradetechforeignexchange.com](http://www.tradetechforeignexchange.com)

- Examining currency indices for emerging markets to outline up and coming currencies
- Evaluating the role of central banks in FX market: Should there be the current amount of oversight and intervention?
- Defining the role of regionalization by exploring the impact of China in global and Asian markets for FX trading
- Trace USD import and exports between Middle East and China to identify where the next movements will be coming from

## 3:15 Afternoon Break & Opportunity To Network

### 3:45 Roundtable Discussion – Ideas Xchange

Discuss various concepts presented in the day to ensure you walk away with profit generating ideas to improve your trading desk. Take this opportunity to actively participate in small group discussions that ensure you share and gain best practices on the following topics:



## 5:15 Cocktail Reception



### Generate New Contacts With Leading Fx Traders Over A Round Of Cocktails!

Many believe the reception is the most valuable time they spend at TradeTech FX because it is an opportunity to unwind and have insightful conversations in small groups. So make sure to **bring your business cards** and a thirst for knowledge!

## 6:00 End Of Day One

# MAIN CONFERENCE DAY TWO

Wednesday, February 11th, 2009

8:30 **Conference Registration & Continental Breakfast**

9:15 **Chairperson's Opening Address**

9:30 **PANEL: Integrating Black Box Strategies Into Your Existing Trading Strategy To Generate Pure Alpha**



Erik Postnieks  
CEO & CIO

**Wooster Asset Management, LLC**



James F. Lubin  
Principal and Director

**Hyman Beck & Co., Inc.**

- Evaluating the increase in high frequency black box algo strategies used to generate alpha - How has the market grown?
- Analyzing approaches of taking a full exposure to FX risk and adding FX class to optimize alpha
- Developing an FX strategy that best suits your portfolio and resources based on the results you are looking to generate

10:05 **BUY SIDE/SELL SIDE PANEL: Identifying The Value Of An Algo To Evaluate The ROI Derived From It**



Christian von Strachwitz  
Chief Executive Officer

**Quaesta Capital**

Paul Buckley  
Director, AES FX Sales  
**Credit Suisse**

- Identifying the driving forces of the algo to understand the algo development:
  - Higher frequency trades
  - Based on technical pattern or fundamental rules
  - Style of the algo e.g. trend-following
- Determining the necessity of algos from operational and risk management perspective
- Evaluating the risk profile of integrating algo's into your trading strategy
- Tracking and monitoring the algo to evaluate how it adds to your bottom line

10:45 **Morning Break & Networking Opportunity**

11:15 **PANEL: Benchmarking For Currency Execution To Establish Standards And Achieve Greater Performance Measurements: An Investor's Perspective**



Eric Busay  
Portfolio Manager

**California Public Employees' Retirement System (CalPERS)**

Momtchil Pojarliev  
Head, Currencies

**Hermes Fund Managers Limited**

- Setting industry standards and benchmarks in a fragmented FX market – Where do we start?
- Achieving standardization of the reporting process by effectively utilizing benchmarking
- Measuring manager performance utilizing standard tracking metrics

12:00 **PANEL: Implementing An Optimal Algorithmic Trading Desk – Understanding & Developing Your Algo Needs**

Erik Lehtis  
Head FX Trader

**Wolverine Trading LLC**

Michael Perkins  
Quantitative Trader

**Resonance Capital Management**

- Analyzing the pros and cons from utilizing algos on your trading desk
- Evaluating the use of in-house v. off-the-shelf to identify benefits for your business
- Collaborating with IT by understanding new responsibilities of maintaining an algo trading environment

12:45 **PANEL: Examining Best Practices In FX Risk Management Techniques**



Theresa Patti  
Managing Director, Senior Portfolio Strategist

**QFS Asset Management**



Erik Postnieks  
CEO & CIO

**Wooster Asset Management, LLC**

- Examining risk control strategies to avoid large, rapid draw downs in your FX trades
- Analyzing new techniques in correlation analysis and volatility forecasting to reduce the risk exposure in your FX portfolio
- Exploring FX risk in emerging markets - What do you need to watch out for?
- Employing options as a risk management technique to further solidify your FX portfolio

1:25 **Lunch For All Attendees And End Of TradeTech FX**

Join **TradeTech Foreign Exchange Group on**

**Linked-in** and network with buy-side, sell-side, institutional investors, and technology vendors on how the FX market is evolving in this volatile environment. Go to **www.TradeTechForeignExchange.com** to learn more.



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## Trade Tech Foreign Exchange 2009 Pricing

**Limited Complimentary Buy-Side Passes Available!**

Please contact Gaianti Surajbali at 646-200-7446 or gsurajbali@wbresearch.com to see if you qualify

| Buy Side*   | \$300 Discount<br>Valid Through 11/11/08 | \$200 Discount<br>Valid Through 12/9/08 | \$100 Discount<br>Valid Through 1/9/09 | Full Price<br>After 1/9/09 |
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| <b>Main Conference + FX Refresh Day</b><br>Feb 9-11, 2009 | \$899                                    | \$999                                   | \$1099                                 | \$1199                     |
| <b>Main Conference Only</b><br>Feb 10-11, 2009            | \$699                                    | \$799                                   | \$899                                  | \$999                      |
| <b>FX Refresh Day Only</b><br>Feb 9, 2009                 | N/A                                      | N/A                                     | N/A                                    | \$349                      |

\***Buy Side** Institutions include any and all financial institutions engaged in managing funds of money on behalf of their client base e.g. a pension or insurance fund.

| Sell Side**   | \$300 Discount<br>Valid Through 11/11/08 | \$200 Discount<br>Valid Through 12/9/08 | \$100 Discount<br>Valid Through 1/9/09 | Full Price<br>After 1/9/09 |
|---|--|---|--|----------------------------|
| <b>Main Conference + FX Refresh Day</b><br>Feb 9-11, 2009 | \$1699                                   | \$1799                                  | \$1899                                 | \$1999                     |
| <b>Main Conference Only</b><br>Feb 10-11, 2009            | \$1499                                   | \$1599                                  | \$1699                                 | \$1799                     |
| <b>FX Refresh Day Only</b><br>Feb 9, 2009                 | N/A                                      | N/A                                     | N/A                                    | \$549                      |

\*\***Sell Side** Institutions are banks.

| All Other Pricing***                                      | Price  |
|---|--------|
| <b>Main Conference + FX Refresh Day</b><br>Feb 9-11, 2009 | \$2848 |
| <b>Main Conference Only</b><br>Feb 10-11, 2009            | \$2099 |
| <b>FX Refresh Day Only</b><br>Feb 9, 2009                 | \$849  |

\*\*\***All Other** is any service provider — Including software vendors, internet developers, technology vendors, solution providers, third party logistics providers, consultants or companies with primary revenues resulting from commissions, subscriptions and/or advertising. No discounts apply to the "Other" rate.

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With multiple sessions, high-level networking and so much to be gained, the more members of your team that can attend, the more your organization will benefit. To accommodate this TradeTech Foreign Exchange offers you the following team discounts:

| Number of Attendees | Buy Side | Sell Side | Others |
|---------------------|----------|-----------|--------|
| 2-3                 | 20%      | 15%       | None   |
| 4-5                 | 25%      | 20%       | 15%    |
| 6 plus              | 30%      | 25%       | 20%    |

To secure space for your team, register online at [www.tradetechforeignexchange.com](http://www.tradetechforeignexchange.com) or contact Bill Penny at 1-866-691-7771 or bpenny@wbresearch.com.

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11 Fulton Street  
Atop The Fulton Market Building  
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