



NEW YORK TIME ZONE

Digital Event

11:55 – 12:00 PM

Welcome Remarks

Mr. Nicolas Bornozis, President – Capital Link, Inc

CEF Industry Roundtable

Moderator: Ms. Mariana Fariña, CFA, Research Director - CEFs & ETPs/Passive Products - Wells Fargo Investment Institute

12:00 – 12:40 PM

Panelists:

- **Mr. Mike Taggart**, Closed-End Fund Specialist - **abrdn**
- **Mr. Stephen Minar**, Managing Director – **BlackRock**
- **Mr. Robert F. Bush, Jr.**, Senior Vice President, Director of Closed-End Fund Products - **Calamos Investments**
- **Mr. Stephen Davis**, Closed End Funds Product Specialist - **Nuveen**

12:50 – 1:30 PM

The Use of Leverage

Presentation by:

Mr. Steven Johnson – Associate Director, Fund & Asset Manager Ratings - **Fitch Ratings**

ETF Industry Roundtable

Moderator: Mr. Mo Sparks, Director, Exchange Traded Products - **New York Stock Exchange**

1:40 – 2:20 PM

Panelists:

- **Mr. Anthony Rochte**, Managing Director and Global Head of Exchange-Traded Funds - **Morgan Stanley Investment Management**
- **Mr. Matthew Schwark**, Vice President, ETF Capital Markets Group - **State Street Global Advisors**
- **Mr. Michael Venuto**, Co-Founder & CIO – **Tidal Financial Group**

2:30 – 3:10 PM

Analyst Roundtable

Moderator: Mr. Robert F. Bush, Jr., Senior Vice President, Director of Closed-End Fund Products - **Calamos Investments**

Panelists:

- **Mr. Alexander Reiss**, Director – **Stifel**
- **Ms. Mariana Fariña**, CFA, Research Director - CEFs & ETPs/Passive Products - **Wells Fargo Investment Institute**



**22nd Annual Capital Link
Closed-End Funds and
Global ETFs Forum**

Wednesday, November 1, 2023
Digital Conference

In Cooperation With



FORUM CONCLUSION