

From: James Ramos <James.Ramos@cityofchicago.org>
Sent: Tuesday, July 23, 2024 1:13 PM
To: Steve Berlin <Steve.Berlin@cityofchicago.org>
Subject: Updated Info

Hello Mr. Berlin,

I am sending you this email to let you know that I attended the Institutional Retreat which was hosted/produced by the Markets Group in Park City, Utah on July 15th -17th. The Markets Group invited me to attend and paid for all the attendees' lodging. (All of the attendees will be reimbursed). A light breakfast and lunch were provided on Tuesday July 16th and Wednesday 17th for all the attendees. I didn't eat breakfast, nor did I eat lunch on Wednesday July 17th.

As written on the Markets Group Information Package, 'The forum is designed to bring together 75+ of the top minds in institutional investment nationwide comprised of senior leadership such as chief investment officers and senior investment staff.

Here is a rundown of number of panels, keynote addresses, and discussions that I attended:

Monday, July 15th, 2024

Welcome Fireside Chat: Have Politics Made ESG a Waste of Time?

Keynote Speakers:

John Skjervem, Chief Investment Officer, Utah Retirement Systems

Robert G. Eccles, Saïd Business School, University of Oxford

Tuesday, July 16th, 2024

- **Breakfast Presentation: Deciphering Macro Markets in the Age of AI**
- **Welcome Remarks**
- **Organizer: William Coba, Head of Institutional Relations – North America, Markets Group**
- **The Global Stage: A Geopolitical Update by Admiral James Stavridis, USN (Ret)**
- **Panel Discussion: Opening Bell: The Next 12 Months at a Glance**
- **Keynote Interview: Fixed Income: Reassessing the Asset Class in Uncertain Times**
- **Panel Discussion: Alternatives – Time to Shine**

- **Morning Networking Break – hosted by LSV Asset Management**
- **The Equity Equation: Evaluating Impact on Portfolios**
- **Panel Discussion: Institutional Views on Private Credit’s Growing Portfolio Utility & Importance**
- **Networking Luncheon & Roundtable Discussions**
- **Panel Discussion: Portfolio Construction - Opportunities Within the Current Markets**
- **Panel Discussion: Fixed Income: Trends Shaping Today’s Landscape**
- **Panel Discussion: Emerging Markets: An Overview of Equity and Debt**
- **Interview: The Accelerating Pace of Change and Evolving Characteristics that**
- **Leadership Roundtable: Decision-Making in Disruptive Times**
- **Fireside Chat and Chief Investment Officer Hall of Fame Induction Ceremony**
- **Host’s Closing Remarks**

Wednesday, July 17th, 2024

- **Breakfast Presentation: Artificial Intelligence: Navigating Opportunities and**
- **Welcome Remarks**
- **Keynote Presentation: Does anyone out there have a crystal ball.**
- **Panel Description: Evaluating Real Assets from Opportunistic to Niche Strategies**
- **Panel Discussion: Differentiated High Yield**

Let me know if there is any additional information you need.

Thank you.

James Ramos