Financial Data Professional Institute
Usage of Alternative Data and ML in Asset Classes.

Panel discussion with
Michael Oliver Weinberg, Managing Director, Head of Hedge Funds ad Alternative Alpha, APG
Peter Strikwerda, Global Head of Digital & Innovation, APG

Hosted by
Aaron Filbeck, Associate Director of Content Development CAIA Association
Mehrzad Mahdavi, Executive Director, FDP Institute

Mirjam Dekker, Project Manager, FDP Institute

www.fdpinstitute.org
March 25, 2020
Agenda

• Welcome
• Introductions

Michael Oliver Weinberg
Managing Director,
Head of Hedge Funds
and Alternative Alpha,
APG

Peter Strikwerda,
Global Head of
Digital & Innovation,
APG

Aaron Filbeck
Associate Director of
Content Development
CAIA Association

Mehrzad Mahdavi
Executive Director
FDPI

Mirjam Dekker
Project Manager
FDPI

• Panel discussion: Usage of Alternative Data and ML in Asset Classes.
• Q & A (please add your questions to the chat!)
The Times They Are – A – Changin’

A Conversation with Michael Oliver Weinberg, CFA

Michael Oliver Weinberg, CFA, Managing Director, Epoch Investment Partners, has been a leader in the investment industry for over 30 years. He is known for his deep understanding of the investment world and his commitment to innovation. In this conversation, Mr. Weinberg shares his insights on the current state of the market and his predictions for the future.

Question: What are the major trends in the investment world today?

Weinberg: Today, the investment world is characterized by several major trends. Firstly, the shift towards alternative investments is gaining traction. Investors are looking beyond traditional asset classes to find new sources of returns. Secondly, environmental, social, and governance (ESG) considerations are becoming increasingly important. Investors are recognizing the impact of their investments on the world and are choosing to invest in companies that align with their values. Thirdly, the use of technology in investment management is becoming more widespread. Artificial intelligence, machine learning, and big data are being used to enhance investment decision-making.

Question: How have these trends affected your investment strategies?

Weinberg: These trends have influenced our investment strategies in several ways. We have diversified our investment portfolio to include alternative investments such as private equity and real estate. We have also incorporated ESG considerations into our investment process, ensuring that our investments align with our values. Additionally, we have implemented technology to enhance our investment decision-making, using data analytics to identify investment opportunities.

Question: What advice do you have for investors looking to navigate the current market?

Weinberg: For investors looking to navigate the current market, I recommend focusing on long-term strategies. It is important to understand the risks and rewards associated with each investment and to make decisions based on a thorough analysis. Furthermore, investors should consider incorporating ESG considerations into their investment process, recognizing the impact of their investments on the world. Finally, investors should stay informed about market trends and developments, using technology to access real-time data and insights.

Click the article to download!
Q & A

Kind reminders of upcoming webinars as we go through the Q & A. Add your questions in the chat room please.

Click any of the webinar descriptions to register!

WEBINAR SERIES
A Conversation With...

George Mussalli, CFA
Mike Chen, Ph.D.
PanAgora

“An integrative Approach to Quantitative ESG Investing”
April 1, 2020 @ 12noon

WEBINAR SERIES
A Conversation With...

Ganesh Mani
Adj. Faculty Carnegie Mellon

Managing the Data Supply Chain
April 7, 2020
1pm EDT

WEBINAR SERIES
A Conversation With...

Rick Roche, CAIA
Man. Dir. Little Harbor Advisors

“Evolution of Machine Learning in Investment Mgmt.”
April 22, 2020
1 pm EST
• Online Requirements

➢ Choose between two (2) Python or two (2) R programming classes (4-6 hours each).
➢ The online classes can be completed before or after FDP exam.
➢ No programming background is needed to complete the online classes or the FDP exam.

• FDP Exam

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<tr>
<th>8 Topics</th>
<th>Approximate Weight %</th>
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<tbody>
<tr>
<td>1. Introduction to Data Science &amp; Big Data</td>
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<tr>
<td>2. Data Mining &amp; Machine Learning: Introduction</td>
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<td>4. Data Mining &amp; Machine Learning: Classification &amp; Clustering</td>
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<td>5. Data Mining &amp; Machine Learning: Performance Evaluation, Back testing &amp; False Discoveries</td>
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<td>6. Data Mining &amp; Machine Learning: Representing &amp; Mining Text</td>
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<td>7. Big Data, Data Mining &amp; Machine Learning: Ethical &amp; Privacy Issues</td>
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<td>8. Big Data and Machine Learning in the Financial Industry</td>
<td>30-50</td>
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• Next exam window: October 26 – November 8, 2020
• New curriculum available May 10th
• Registration opens May 10th
• More info: www.FDPIstitute.org
In Closing

- Our upcoming webinars and webinar recordings can be found on
  [www.fdpinstitute.org/webinars](http://www.fdpinstitute.org/webinars)
  [www.caia.org/caia-infoseries](http://www.caia.org/caia-infoseries)

Learn more about the FDP Institute at
[www.fdpinstitute.org](http://www.fdpinstitute.org)