

# BlackRock Educational Academy 2025

## Fixed Income and Equities

September 15 – 18

Please note all times are indicated in EST

*Draft Agenda subject to changes*



Available for  
On-Demand

Monday, September 15 – Fixed Income	
9:00 AM – 9:45 AM	<b>Registration and Breakfast</b>
9:45 AM – 10:00 AM	<b>Welcome and Introduction to BlackRock Educational Academy</b> <i>Jerry Pucci, Managing Director, Office of CIO, Fundamental Fixed Income</i>
10:00 AM – 10:45 AM	<b>Market Outlook for Fixed Income</b> <i>Rick Rieder, Chief Investment Officer, Fundamental Fixed Income</i> 
10:45 AM – 11:15 AM	<b>Group Photo &amp; Refreshment Break</b>
11:15 AM – 11:45 AM	<b>The Economic Backdrop</b> <i>James Sweeney, Head of Economics, Fundamental Fixed Income</i> 
11:45 AM – 12:30 PM	<b>Emerging Markets Overview / Outlook</b> <i>Pablo Goldberg, Head of Research and Portfolio Manager, Emerging Market Debt</i> 
12:30 PM – 1:30 PM	<b>Networking Lunch</b>
1:30 PM – 2:15 PM	<b>US Rates Outlook</b> <i>Chi Chen, Portfolio Manager, Fundamental Fixed Income</i>
2:15 PM – 2:45 PM	<b>The Role of MBS in a Mortgage Portfolio</b> <i>Matt Kraeger, Co-Head of Agency Mortgage Team, Fundamental Fixed Income</i>
2:45 PM – 3:15 PM	<b>Refreshment Break</b>
3:15 PM – 3:45 PM	<b>The Evolution of Securitized Assets</b> <i>Samir Lakhani, Co-Head of the Securitized Assets Team, Fundamental Fixed Income</i> 
3:45 PM – 4:45 PM	<b>Panel Discussion: Positioning for Uncertainty</b> <i>Moderator: Sam Brindley, Fundamental Fixed Income, Product Strategy</i> <i>Ann Keane, Senior Credit Research Analyst, Investment Grade Credit Research</i> <i>Jenny Xiao, Global Head of Rates Trading, Trading Group</i> <i>Abigail Parzanese, Portfolio Manager, Fundamental Fixed Income, Bank Loans</i>
4:45 PM – 5:00 PM	<b>Day 1: Recap and Wrap Up</b> <i>Jerry Pucci, Managing Director, Office of CIO, Fundamental Fixed Income</i>

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Tuesday, September 16 – Fixed Income	
9:00 AM – 10:00 AM	<b>Registration and Breakfast</b>
10:00 AM – 10:05 AM	<b>Day 2: Introduction &amp; Welcome</b> <i>Jerry Pucci, Managing Director, Office of CIO, Fundamental Fixed Income</i>
10:05 AM – 10:45 AM	<b>Private Credit: Macro Credit Implications</b> <i>Amanda Lynam, Head of Macro Credit Research, Portfolio Management Group</i> <i>Dominique Bly, Macro Credit Research Strategist, Portfolio Management Group</i> 
10:45 AM – 11:30 AM	<b>High Yield Credit</b> <i>Carly Wilson, Portfolio Manager, Global Credit Platform in Fundamental Fixed Income</i>
11:30 AM – 12:15 PM	<b>CLO Outlook</b> <i>Saffet Ozbalci, Head of Structured Credit, Fundamental Fixed Income</i> 
12:15 PM – 1:30 PM	<b>Networking Lunch</b>
1:30 PM – 2:15 PM	<b>AI in the Fundamental Investment Process</b> <i>Jacob Caplain, Multi-Sector Strategy, Office of the CIO, Fundamental Fixed Income</i>
2:15 PM – 2:45 PM	<b>Flexibility in Fixed Income</b> <i>Joyce Choi, Head of Institutional Product Strategy, US iShares Fixed Income ETF</i>
2:45 PM – 3:15 PM	<b>Refreshment Break</b>
3:15 PM – 4:15 PM	<b>Panel Discussion: Approaches to High Yield, Multi-Sector Income</b> <i>Moderator: Emanuella Enenajor, Head of Leveraged Finance Product Strategy, Fundamental Fixed Income</i> <i>Melissa Barnard, High Yield Portfolio Manager, Fundamental Fixed Income</i> <i>Aaron Aguiar, High Yield Portfolio Manager, Systematic Fixed Income</i> <i>Dylan Price, Multi-Sector Portfolio Manager, Global Fixed Income</i>
4:15 PM – 4:30 PM	<b>Day 2: Closing Remarks</b> <i>Jerry Pucci, Managing Director, Office of CIO, Fundamental Fixed Income</i>
	<i>End of Fixed Income Agenda</i>
5:00 PM	<b>Drinks &amp; Canapes</b> <i>Boulevard</i>

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Wednesday, September 17 – Equities	
8:30 AM – 9:25 AM	<b>Registration and Breakfast</b>
9:25 AM – 9:30 AM	<b>Day 3: Introduction &amp; Welcome</b> <i>Jessica London, Head of Institutional Product Strategy, Fundamental Equities (FE)</i>
9:30 AM – 10:00 AM	<b>Alpha Reimagined</b> <i>Raffaele Savi, Global Head of BlackRock Systematic (BSYS) and Co-CIO and Co-Head of Systematic Equities</i>
10:00 AM – 10:45 AM	<b>Active Equity CIO Perspectives</b> <i>Moderator: Ryan McNulty, Co-Head of U.S. Fundamental Equities Product Strategy</i> <i>Carrie King, U.S. &amp; Developed Markets CIO, Fundamental Equities</i> <i>Darshan Puri, Head of Equity Strategy for the Americas, Fundamental Equities</i> 
10:45 AM – 11:15 AM	<b>Refreshment Break</b>
11:15 AM – 12:00 PM	<b>Panel Discussion: Evolution of Equity Research: A Focus on Data &amp; Tools</b> <i>Moderator: Steve Farkas, Product Strategist, Fundamental Equities Income &amp; Value</i> <i>David Zhao, Co-Director of Research, Fundamental Equities Income &amp; Value</i> <i>Sally Du, Quantitative Alpha Research Group Lead, Income &amp; Value Team (FE)</i>
12:00 PM – 12:30 PM	<b>Geopolitics and Emerging Markets</b> <i>Regina Zalilova, Lead Product Strategist, Global Emerging Markets &amp; Developed Unconstrained Equity Strategies in the Americas</i> <i>Emily Fletcher, Portfolio Manager &amp; Research Analyst, Global Emerging Markets (FE)</i> 
12:30 PM – 1:30 PM	<b>Networking Lunch</b>
1:30 PM – 2:00 PM	<b>Expert Insight on the Healthcare Sector</b> <i>Zachary Brown, Product Strategist, Fundamental Equities Sector &amp; Thematics</i> <i>Erin Xie, Portfolio Manager &amp; Head of Fundamental Equities Health Sciences</i>
2:00 PM – 2:45 PM	<b>State of the Consumer</b> <i>Moderator: Mark Orans, Equity Strategist, Fundamental Equities Income &amp; Value</i> <i>Lisa Yang, Portfolio Manager &amp; Co-Head of the Consumer Industry Super Group (FE)</i>
2:45 PM – 3:15 PM	<b>Refreshment Break</b>
3:15 PM – 4:00 PM	<b>Panel Discussion: Global Real Assets Revolution</b> <i>Moderator: Max Zamor, Product Strategist, Fundamental Equities Real Asset Securities</i> <i>Curtis Yee, Co-Portfolio Manager, U.S. Listed Real Estate</i> <i>Balfe Morrison, Head of Listed Infrastructure, Global Real Asset Securities</i> 
4:00 PM – 4:30 PM	<b>Technology: Next Leg of AI</b> <i>Moderator: Diego Blanco, Product Strategist, Fundamental Equities Sector &amp; Thematics</i> <i>Reid Menge, Co-Portfolio Manager of Technology Equity, Fundamental Equities</i> 
4:30 PM – 4:40 PM	<b>Day 3: Closing</b> <i>Jessica London, Head of Institutional Product Strategy, Fundamental Equities (FE)</i>

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Thursday, September 18 – Equities	
9:00 AM – 10:00 AM	<b>Registration and Breakfast</b>
10:00 AM – 10:05 AM	<b>Day 4: Introduction &amp; Welcome</b> <i>Carolina Caro, Senior Investment Strategist, Systematic Active Equities</i>
10:05 AM – 10:35 AM	<b>A 40 Year Perspective on the Future of Asset Management</b> <i>Gerardo Rodriguez, Global co-Head of Product Strategy, Systematic Active Equities</i>
10:35 AM – 11:05 AM	<b>Combining Uncorrelated Return Streams with Portable Alpha</b> <i>Katelyn Gallagher, Senior Investment Strategist, Systematic Active Equities</i> 
11:05 AM – 11:30 AM	<b>Refreshment Break</b>
11:30 AM – 12:15 PM	<b>Alpha vs. Beta</b> <i>Rachel Knox, Investment Strategist, Systematic Active Equities</i>
12:15 PM – 12:45 PM	<b>Systematic Alpha Innovation</b> <i>Richard Mathieson, Portfolio Manager, Systematic Active Equities</i>
12:45 PM – 1:45 PM	<b>Networking Lunch</b>
1:45 PM – 2:15 PM	<b>Seeking Growth and Income</b> <i>Monica Bueno, Senior Investment Strategist, Systematic Active Equities</i> 
2:15 PM – 3:00 PM	<b>Panel Discussion: Rotation strategies at the core</b> <i>Moderator: Theo Bresolin, Investment Strategist, Systematic Active Equities</i> <i>Carolina Caro, Senior Investment Strategist, Systematic Active Equities</i> <i>Scott Gladstone, Senior Investment Strategist, Systematic Active Equities</i> 
3:00 PM – 3:15 PM	<b>Refreshment Break</b>
3:15 PM – 3:45 PM	<b>The Whole Portfolio with Fixed Income &amp; Equities</b> <i>Calvin Yu, Head of the Client Insight Unit (CIU), Americas Institutional Business</i> <i>Angela Zhang, Director, Client Insight Unit (CIU)</i>
3:45 PM – 4:15 PM	<b>Program Close and Farewell</b> <i>Carolina Caro, Senior Investment Strategist, Systematic Active Equities</i> <i>Paige Wagner, Head of BlackRock Educational Academy</i>