



Newsletter - July 2018

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New Stakeholders

We are delighted to welcome a new addition to the SBAI family:

Investor Chapter

- Clocktower Group LP (USA)

SBAI Roundtable on big data and artificial intelligence

The SBAI continues to explore the topic of big data, machine learning and artificial intelligence in asset management and will hold its third event, to be hosted in London on **4 September 2018** in collaboration with Nasdaq. This important event will focus on the “state of play”, legal and compliance considerations and vendor due diligence. Speakers include leading specialists and senior representatives from Amplitude Deep Learning, Hivemind, Jasper Capital International, Man Alpha Technology, Marshall Wace, Nasdaq, Simmons & Simmons and Systematica Investments.

The event in London follows the roundtables hosted earlier this year in [New York \(in collaboration with Winton\)](#) and [Hong Kong \(in collaboration with Canada Pension Plan Investment Board\)](#).

Open Protocol's new updates to the template

Following our publication of the latest Open Protocol template via our June 2018 newsletter, this is to report that there have been a few additional changes to the template. The OP Working Group has updated its templates, which are now available on the [Open Protocol section of the SBAI Toolbox](#).

It is important to note that the only change is to the sector tree. Other changes to the manual are additional clarifications that will help fill in the template. New downloadable files include:

- Open Protocol Manual I - October 2018 (without highlighted changes): updated manual for those who are new to OP
- Open Protocol Manual I - October 2018 (with highlighted changes): same as previous version but the changes from the August 2016 version are highlighted in red for those who are already producing OP reports



- Open Protocol Template I Revised October 2018: changes to the strategy tree in equity, credit and convert tab.

The summary of all changes to the OP template can be found in the [FAQ section of the OP webpage](#).

Managers are advised to start using the new template after 1 October 2018. In the meantime they should continue to use the 2016 version.

Please note that the XML template will be updated and made available for downloading later this year. Updates will be announced via the SBAI monthly newsletters.

The changes come into effect on 1st October 2018. The earliest the managers would be required to produce reports in the new format will be 28th November 2018 (20 business days after October month-end).

Upcoming events

SBAI in Australia and New Zealand

Topics include: institutional investor priorities 2018/19 – evolving investor needs, big data/AI in asset management – hype versus reality, factor based investing/dynamic beta, culture & diversity and cyber security.

- **21 August 2018: Melbourne, SBAI Institutional Investor Roundtable**
Speakers include senior representatives from Alyeska Investment Group, Capital Fund Management, Future Fund, PAG, Telstra Super and Victorian Funds Management Corporation
- **22 August 2018: Sydney, SBAI Institutional Investor Roundtable**
Speakers include senior representatives from Australian Securities & Investments Commission, Alyeska Investment Group, Capital Fund Management, Edgehaven, Future Fund, PIMCO, QIC and Sunsuper
- **24 August 2018: Auckland, SBAI Institutional Investor Roundtable**
Speakers include senior representatives from Annuitas, Capital Fund Management, IBM, KMPG, New Zealand Superannuation Fund and Sunsuper

Other events

- **4 September, London: Big Data & Artificial Intelligence Roundtable**
Speakers include leading specialists and senior representatives from Amplitude Deep Learning, Hivemind, Jasper Capital International, Man Alpha Technology, Marshall Wace, Nasdaq, Simmons & Simmons and Systematica Investments
- **26 September, London: SBAI Annual General Assembly**
This annual event will celebrate the 10th anniversary of the SBAI and will include two panel discussions focusing on culture & diversity, as well as institutional investor priorities. The speakers include senior representatives from Arrowgrass, Caisse de dépôt et placement du Québec, Canada Pension Plan Investment Board, Cheyne Capital and Sabre Fund Management.



- **9 October 2018, Washington D.C.: SBAI Institutional Investor Roundtable focusing on culture and diversity**
- **15 October 2018, London: SBAI Institutional Investor Roundtable at Albourne Annual Conference**
- **27 November, Montreal: SBAI Institutional Investor Roundtable**
- **28 November 2018, Chicago: SBAI Institutional Investor Roundtable**
- **December 2018, Boston: SBAI Institutional Investor Roundtable**
- **Week of 10 December 2018, Tokyo: SBAI Institutional Investor Roundtable (tbc)**
- **Week of 10 December 2018, Shanghai: SBAI Institutional Investor Roundtable (tbc)**

The full event schedule is available [here](#). More events will be announced in due course.

APPENDIX

Clocktower Group LP

Clocktower Group is a Santa Monica-based, global macro-focused investment firm that delivers customized products to help institutional clients achieve their specific investment goals. Steve Drobny founded Clocktower Group in 2007 and in the decade since, the firm has expanded its reach and gathered a diverse team of professionals with broad experience across the alternatives space. Clocktower's business now spans hedge fund seeding, asset allocation and manager selection services, and financial technology venture capital investing. In all it does, Clocktower seeks to foster alignment between managers, founders, and allocators, building long-term strategic relationships and facilitating information flow. In 2018, the firm opened an office in Shanghai, which provides on-the-ground insight into Chinese and Asian markets and integrates leading Chinese managers, allocators, and tech innovators into the firm's network.



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