

BattleFin & Jefferies Present ALTERNATIVE DATA DISCOVERY DAY NEW YORK 2019



June 19th & 20th, 2019
The Plaza — New York, NY

DAY 1 – WEDNESDAY JUNE 19TH

7:30AM – 8:30AM

Registration and Light Breakfast 2nd Floor

Track 1: Alternative Data 3rd Floor Grand Ballroom

8:30AM – 9:00AM

Healthcare Panel: Leveraging data to predict outcomes

m: Anthony Petrone, Healthcare Analyst- Medical Supplies & Devices – Jefferies
Paul Nemirovsky, PhD, CEO – dMetrics
Victoria Chen, Senior Account Executive – GlobalData Healthcare

9:00AM – 9:15AM

The Case for a Data Delivery and Operations Utility
Philip Brittan, CEO – CRUX Informatics

9:15AM – 9:30 AM

BOOM. Combining Alt Data with Fundamental data to generate signals
m: Tim Harrington, CEO – BattleFin
Mahesh Narayan, Head of Portfolio Management and Research – Refinitiv
Austin Burkett, Head of Quant & Feeds – Refinitiv

9:30AM – 9:50AM

Internet and Technology sector data signals on AAPL, AMZN, GOOG, FB and ...
m: Alexander Giaimo, VP Associate – Jefferies
John Wiora, COO – ktMINE
Ryan Schreiber, VP Financial Services – Vertical Knowledge

9:50AM – 10:10AM

Data Compliance & Privacy Panel: Insight vs Inside information
m: Peter Greene, Vice Chair, Investment Management – Lowenstein Sandler LLP
Nikita Pillai, Alternative Data Strategy @ CPP Investment Board – CPPIB
David Gelinas, Director, Product Management, Quant & Feeds – Refinitiv

10:10AM – 10:50AM

BREAK

Track 2: Corporate 3rd Floor Centennial Foyer

8:30AM – 9:00AM

How corporations can use alt data for competitive intelligence and other signals. Data or Die.

m: Rob Martinez, CRO – BattleFin
Jeff Schmidt, Founder and CEO – DataPulse
J.T. Levin, Commercial Director – Enigma
Justin Zhen, Co-Founder – Thinknum

9:00AM – 9:15AM

How are investors using alternative data to analyze your companies.
Rayne Gaisford, Head of Data Strategy and Equity Research – Jefferies

9:15AM – 9:30 AM

Using alternative data to find more meaningful cohorts?
J.T. Levin, Commercial Director – Enigma

9:30AM – 9:45AM

Using alt data to understand the lifetime value of a customer
Kyle Billings, Head of Corporate Information Systems – M Science LLC

9:45AM – 10:05AM

How Companies Use Alternative Data to Drive Their Business: A strategic and tactical dive into the Food Delivery Space
John Nathenson, SVP, Strategic Data Solutions and Sales – EdisonTrends

10:05AM – 10:45AM

BREAK

10:45AM – 11:05AM

Using reliable alternative data to understand supply chain risk even down to inter-day data
m: Rob Martinez, CRO – BattleFin
Andrew Ulmer, VP of Business Development – Capella Space
Nathan Sapsin, CEO – IQ banker



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DAY 1 – WEDNESDAY JUNE 19TH CONTINUED

Track 1: Alternative Data 3rd Floor Grand Ballroom

10:50AM – 11:10AM

Using Knowledge graphs to deliver products and solutions to make investment decisions

m: Tim Harrington, CEO – BattleFin
Tharsis Souza, VP Product Development – Yewno
Adam Baron, Director, Innovation, Big Data
Quantitative Research – Refinitiv
Tom Liu, CEO – ChinaScope

11:10AM – 11:30AM

Finding signals from within. Are you sitting on a data gold mine?
Armando Gonzalez, CEO – RavenPack

11:30AM – 11:50AM

#ChangePays – An examination of gender diversity in the C-Suite
Daniel Sandberg, Senior Director, Quantamental Research – S&P Global Market Intelligence

12:00PM – 1:10PM

Lunch – 2nd Floor Terrace Room Exhibit Hall

1:10PM – 1:20PM

Transition

1:20PM – 3:20PM

One-on-One Meetings – 3rd Floor Grand Ball Room and Centennial Foyer

3:20PM – 4:00PM

Break

4:00PM – 5:40PM

One-on-One Meetings – 3rd Floor Grand Ball Room and Centennial Foyer

5:30PM – 6:30PM

Exhibit Networking – 2nd Floor Terrace Room Exhibit Hall

Track 2: Corporate 3rd Floor Centennial Foyer

11:05AM – 11:20AM

Factoring the Value of Corporate Brands By Using Alternative Data

Rick Davis, Chairman and CEO – BrandLoyalties

11:20AM – 11:35AM

How corporates and PE firms can leverage alternative data
Adam Braff, Founder – Braff & Company



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DAY 2 – THURSDAY JUNE 20TH
8:00AM – 8:30AM

Registration and Light Breakfast 2nd Floor

Track 1: Alternative Data 3rd Floor Grand Ballroom

8:30AM – 8:50AM

Macro panel: Real Estate - How this critical industry moves companies and markets - what can the data tell you?

m: Marc LoPresti – LoPresti Law Group, Co-Founder - BattleFin

Gavriel Merkado, CEO – REalyse

Aviva Fink, VP of Business Development – Reonomy

Karan Singh, Business Intelligence Data Architect –

Brookfield Properties

8:50AM – 9:05AM

Chemicals, Oil and Gas Panel – Leveraging Alternative Data to make predictions

m: Laurence Alexander, Industrials Analyst-Chemicals, Emerging Technologies and Industrial Biotech (Global) – Jefferies

Joseph Chang, Global Editor – ICIS

Mario De La Ossa, Energy Specialist – Orbital Insight

9:05AM – 9:25AM

Fashion Disruptors: How New Business Models Impact Traditional Retailers

Brandon Liverence, Data Scientist – Second Measure

9:25AM – 9:40AM

Understanding the Alternative Data Pricing environment. How to think about the Return On Investment (ROI) of a dataset.

m: Tim Harrington, CEO – BattleFin

Stewart Stimson, Head of Data Strategy – Jump Trading

Chris Petrescu, Head of Data Strategy – ExodusPoint

Sarah Smith, Senior Director – Edison

9:40AM – 10:00AM

The Evolution of the Alternative Data World. Advances and Outlook for what is to come.

m: John Najarian, Co-Founder – Najarian Family Office

Michael Marrale, CEO

Spenser Marshall, Senior Analyst – MScience

10:00AM – 10:40AM

BREAK

10:40AM – 10:50AM

History is New, History is Now

Dr. Bryan Taylor, Co-Founder and Chief Economist –

Global Financial Data, Inc.

Track 2: Quant 3rd Floor Centennial Foyer

8:30AM – 8:50AM

Combining data sets, entity mapping, common keys, stitching data and things that make you go Hmm.

m: Adam Baron, Director, Big Data

Quantitative Research – Refinitiv

Henrik Grunditz, Co-Founder and CRO – HiveMind

Peter Hafez, Chief Data Scientist – RavenPack

Chris Hammond, Executive Director, Research Signals – IHS Markit

8:50AM – 9:05AM

ETL and data cataloging

Nicolas Doyen, Product Owner for Internal Data

Distribution and Data Monetization Platforms –

Ticksmith

9:05AM – 9:20AM

Data Showcase. Deriving insights from PreData

m: Graham Tolson, Head of Data Sourcing –

BattleFin

Mars Spencer, VP of Financial Markets – PreData

Dakota Killpack, Director of Machine Learning –

PreData

9:20AM – 9:40AM

From Exploring Alternative Data to Rethinking the Research Process

Sylvain Forte, Co-Founder and CEO – SESAMm

9:40AM-9:55AM

Lessons Learned: How to Eliminate the Bias In and Against Artificial Intelligence.

Akash Ganapathi, CEO – Trill.AI

9:55AM – 10:40AM

BREAK

10:40AM – 10:55AM

Data Quality and Testing (Tools and Methods)

Vishal Shah, Director – TresVista



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DAY 2 – THURSDAY JUNE 20TH
CONTINUED

Track 1: Alternative Data 3rd Floor Grand Ballroom

10:50AM – 11:10AM

China Retail and Consumer Panel
m: Stephanie Wissink, Consumer Analyst- Consumer Products – Jefferies
Eric Lindstrom, CEO – LocalGravity
Tom Liu, CEO – ChinaScope

11:10AM – 11:30AM

Tracking Customer Behavior – Web Analytics and other methods
m: Jonathan Matuszewski, Consumer Analyst- Hardlines – Jefferies
Ed Lavery, Solutions Manager – SimilarWeb
Sylvain Forte, Co-Founder and CEO – SESAMm

11:30AM – 11:40AM

Is there still Alpha in Credit Card Data? Understanding and Tracking alpha decay
Dawson Smith, VP, Equity Insights - 1010data

11:40AM – 12:00PM

Consumer Discretionary data deep dive. Overlaps of data and fundamental analysis
m: Janine Stichter, Consumer Analyst-Apparel, Footwear & Textiles, Specialty Softlines – Jefferies
Justin Zhen, Co-Founder - Thinknum
Hans Kullberg, CEO – CrowdThnk

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4:00PM – 5:40PM

One-on-One Meetings – 3rd Floor Grand Ballroom and Centennial Foyer

5:30PM – 8:00PM

Refinitiv BattleFin After Party – 1st Floor Edwardian Room

Track 2: Quant 3rd Floor Centennial Foyer

10:55AM – 11:10AM

Semantically indexing global investment and market research data for better decisions
Chris Ackerson, Head of Product: Search and AI – AlphaSense

11:10AM – 11:30AM

Going Beyond Excel

Jonathan Regenstein, Director of Financial Services – RStudio

11:30AM – 11:45AM

Autonomous signal discovery and testing
Darko Matovski, CEO – Causalens

11:45AM – 12:00PM

Ensemble & Accelerator Data Showcase
m: Rob Martinez, CRO – BattleFin
Beni Gradwohl, Co-Founder & CEO – Cognovi Labs



BATTLEFIN DISCOVERY DAY NYC

JUNE 19-20TH

NYC Alternative Data Science Courses

Learn what it takes to evaluate, work with and generate insight from alternative data.

Built for both quantitative researchers & fundamental analysts.

Refine your skills, while exploring actual alternative data types.

All courses are live coding courses where each participant will work over the Ensemble sandbox platform to code in sync with the instructor. Intermediate programming experience in Python is expected.



DAY 1

ALTERNATIVE DATA ANALYSIS BASICS

COURSE 1: Introduction to Data Analysis and Tools
8:30am - 10:30am

In this training, you will learn how to accelerate your data analyses using the Python language and Pandas, a library specifically designed for interactive data analysis. Work with samples of Alternative data to understand what specific Alternative Data Types are like.

- > Python Pandas core functionality (loading, filtering, grouping, and transforming data).
- > Python Requests, basics of API data transfers.
- > Explore alternative data (Samples of Web scraping data products).

Having completed this workshop, you will understand the fundamentals of Pandas, be aware of common pitfalls, and be ready to perform your own analyses on alternative data sets.

COURSE 2: Advanced Tools of The Trade & Alternative Data Types
10:50am - 12:20pm

In this training, you will learn how to perform advanced analyses on alternative data using PySpark and Ensemble. We will focus on merging datasets too large to fit in memory together and running analyses at scale.

- > Advanced exploration and analysis of Alternative Data samples with PySpark.
- > Working “out of memory” vs “in memory”.
- > Samples of B2b, ESG, or Geo-Location data products.

Having completed this workshop, you will be ready to compute on your own Big Data to generate new insights.

Course 2, prepares participants for the Alternative Data Exploration Modules in day 2.

DAY 2

ALTERNATIVE DATA EXPLORATION MODULES

COURSE 3: Sentiment Data Exploration Module

9:00 am - 11:20 am

DATA TYPE INFO:

In this training, you will focus on using signals from multiple sentiment datasets to predict daily growth for a bucket of stocks. We will then evaluate which stocks had a stronger correlation to the sentiment indicators, and which indicators had the strongest influence on price movement.

MODULE TAKEAWAYS:

- > We will be using a Pandas dataframe to extract our bucket of stocks from the datasets and join them together.
- > We will use featexp to do an initial analysis on which features may have the strongest correlation with price movement.
- > We will build a model using PyTorch and FastAI to forecast price movement.



#BATTLEFINAI

Instructor Bio: Dan Gerlanc

Dan Gerlanc is a data scientist and technologist with more than 15 years of professional experience creating data intensive software. He spent 5 years as a quantitative analyst with two Boston hedge funds before starting Enplus Advisors Inc., a boutique data science and custom software firm, in 2011.

Dan specializes in projects at the intersection of data science and software development, though he frequently consults on either individually. Applying data science for more than ad hoc analysis requires the development of systems to repeatably gather data, evaluate models, and output results, an end-to-end process in which he has more than a decade of experience.

Additionally, Dan teaches data science and software development both at conference seminars and for private clients. He is an author and contributor to several open source projects, speaks at industry conferences, and has published articles in peer-reviewed journals. He is a graduate of Williams College.

