



The Big Picture

BCA'S 45TH ANNUAL CONFERENCE



OCTOBER 22, 2025

The Times Center
242 West 41st Street, New York

CONFERENCE AGENDA

8:00 - 8:10 **WELCOME**

- **Eric Jaffe**, BCA Research CEO

8:10 - 9:00 **SESSION 1**

Macro Panel: The Bull vs. Bear Debate

- **Peter Berezin**, BCA Research Chief Global Strategist
- **Francois Trahan**, President and Founding Partner of The Macro Institute
- **Anna Wong**, Chief US Economist for Bloomberg Economics
- **Martin Barnes**, Former Chief Economist, BCA Research, **Moderator**

9:00 - 10:30 **SESSION 2**

Tech Panel: Innovation Beyond AI

- **Jocelyn Doe**, General Partner at Builders VC
- **Josh Wolfe**, Co-Founder Lux Capital
- **Peter Levin**, Managing Director and Co-Founder at Griffin
- **Charlie Tafoya**, CEO and Co-Founder, Chronograph

10:50 - 11:35 **SESSION 3**

How To Be An Institutional Investor In The Roaring Twenties And Beyond

- **Zach Schreiber**, Co-Founder PointState Capital in a conversation with **Paula Volent**, Vice President and Chief Investment Officer at The Rockefeller University

11:35 - 12:20 **SESSION 4**

Unloved Trade Ideas: How To Invest In Hated Assets

- **Karen Harris**, Managing Director of Bain & Company's Macro Trends Group
- **Jitania Kandhari**, Deputy CIO of the Solutions & Multi-Asset Group and Portfolio Manager for Passport Equity Strategies, Morgan Stanley
- **Arthur Budaghyan**, BCA Research Chief EM/China Strategist
- **Anastasios Avgeriou**, Chief Strategist for Bienville Capital

12:20 - 1:45 **LUNCH SESSION**

The Future of Crypto: Yes, We Are Taking Bitcoin Seriously!

1:45 - 2:30 **SESSION 5: KEYNOTE**

A User's Guide to Making America Great Again

- **Stephen Miran**, Current Chair of the Council of Economic Advisers in the Trump Administration

2:30 - 3:30 **SESSION 6**

Geopolitics: The World Is Not Ending. Your World Is Ending.

- **Marko Papic**, BCA Research Chief GeoMacro Strategist

3:45 - 5:00 **CLOSING SESSION**

Trade and Investment Ideas from BCA Strategists