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investor

RI Canada 2023

RI Canada 2023 agenda

Building Momentum for a Just Transition in Canada

Chelsea Hotel – Toronto | 17-18 October 2023

Day one – Tuesday 17th October

8:00 Registration

8:45 Welcome remarks from Responsible Investor

8:50 Chair's opening remarks

Bruce Simpson, Senior Advisor ESG to multiple companies

8:55 Keynote 1: Setting the stage: A view of global and local sustainability landscapes

- Understanding the connection between the global sustainability landscape to local markets
- Taking a look at the emerging trends and areas of focus for Canadian investors
- How we collectively and individually upkeep the momentum for a just transition

Sarah Chapman, Global Chief Sustainability Officer, Manulife

9:10 Plenary 1: Net zero: Challenges, opportunities, next steps

- Three years on from the first net zero pledges, is implementation matching expectations?
- Will Canadian financial institutions be ready for the first round of interim targets?

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- What are emerging as the key challenges around net zero in the Canadian market?
- Could net zero commitments hinder transition financing and the retirement of dirty assets?

Moderator: Bruce Simpson, Senior Advisor ESG to multiple companies

Speakers:

Joy Williams Executive Director, Financial Institution Net-zero Transition Plans, **GFANZ**
 Sarah Chapman, Global Chief Sustainability Officer, **Manulife**
 Brian Minns, Senior Managing Director, Responsible Investing, **University Pension Plan Ontario**

10:00 Plenary 2: Biodiversity: Protecting nature in investment portfolios

- How to actualize KPIs from COP15
- TNFD's nature-based disclosure - Challenges and opportunities for investors
- Assessing the impact of biodiversity loss in the portfolio
- Reliable and consistent biodiversity data

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

Speakers:

Marie de Montlaur, Senior Advisor Sustainability, **CDPQ**
 Puninda Thind, Finance Nature Lead, **The Climate Change High-Level Champions**
 Brandon Lewis, Director, Sustainability, **Manulife Investment Management**
 Jackie Daitchman, Executive Director, ESG Client Coverage: Climate Application Specialist, **MSCI**

10:50 *Networking break sponsored by ZAIS*

11:20 Keynote: Sustainable finance in Canada: Where are we now?

- Overview of SFAC
- Update on taxonomy and SFAC's latest work
- Evolution of Canada's policy and regulatory space

*Kathy Bardswick, Chair, **Sustainable Finance Action Council***

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

11:40 Plenary 3: International standard setting, taxonomies, and disclosures

- Taking stock of the EU taxonomy and investor disclosure regulation
- Preparing for ISSB reporting: will investor expectations be met?

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- Double materiality and meeting the EU's CSRD requirements
- To what extent is the regulatory push moving the needle on sustainable investment?

Moderator: Pratima Divgi, Head of Capital Markets, North America, **CDP**

Speakers:

Hyewon Kong, Vice President, Head of Responsible Investing, **(IMCO)**
 Michael Jantzi, Independent Review Committee on Standard Setting in Canada, **IFRS**
 Senator Rosa Galvez, Senator, **Quebec**
 Céline Bak, Partner, **Deloitte Canada**

12:30 Plenary 4: Canadian regulatory and policy landscape

- Preparing of Canada's taxonomy
- The role of the Canadian Sustainability Standards Board (CSSB)
- Expectations around CSA's climate disclosure proposals

Moderator: Dustyn Lanz, Senior Advisor, **ESG Global Advisors**

Speakers:

Julie Segal, Senior Program Manager Climate Finance, **Environmental Defence**
 Dan Byrd, ESG & Climate Industry Practice Lead, **Moody's**
 Janet Gillies, Executive Vice-President, Regulatory & Standards, **CPA Ontario**
 Alyson Slater, Head of Sustainable Investment Canada, Public Markets, **Manulife Investment Management**

13:20 Lunch

Stream A	Stream B
<p>14:20 – A1: What makes a credible corporate transition plan?</p> <ul style="list-style-type: none"> • How to assess transition plans? • How to prepare and accomplish transition? • What does it mean to be an existing oil and gas company? • How to mitigate transition risks? <p>Moderator: Stephanie Chow, Director, Climate Finance & Strategy, GFANZ</p>	<p>14:20 – B1: Modern slavery legislation: Mitigating forced labor in the supply chain</p> <ul style="list-style-type: none"> • Bill S-211 impact on the supply chain – How are institutions preparing/implementing? • How have other jurisdictions implemented similar legislation? How does it compare?

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<p>Speakers: Anne-Marie Gagnon, Senior Principal, ESG, Public Markets, BCI Andreas Ross, Head of New Product Research and Development, ZAIS Matt Christ, Portfolio Manager, Ninety One Adam Scott, Executive Director, Shift: Action for Pension Wealth and Planet Health</p>	<ul style="list-style-type: none"> • What are investors doing to mitigating forced labour regarding portfolio companies? <p>Moderator: Gina Gambetta, Reporter, Responsible Investor</p> <p>Speakers: Kevin Thomas, CEO, SHARE Ashley McIntyre, Senior advisor and subject-matter expert, EDC Michelle Albanese, Director, ESG and Responsible Supply Chain, Upswing Solutions Stephen Pike, Partner, Gowling WLG</p>
<p>15:05 <i>Networking Break</i></p>	
<p>15:15 – A2: ESG-labelled bonds: The next generation</p> <ul style="list-style-type: none"> • SLBs vs use-of-proceeds: which format is best suited to the Canadian market? • Can nuclear become an accepted part of the green bond universe? • How will biodiversity and nature feature in the next generation of ESG-labelled bonds? • Do transition bonds have a role to play in financing high-emitting sectors? • What greenwashing challenges will be thrown up by new bond formats and KPIs? <p>Moderator: Anne-Marie Gagnon, Senior Principal, ESG, Public Markets, BCI</p>	<p>15:15 – B2: Indigenous engagement and reconciliation in investment strategy</p> <ul style="list-style-type: none"> • How to adopt reconciliation principles into the portfolio? • How are boards and asset managers implanting and successfully bridging the gap of indigenous rights? • How to materialise support for the indigenous community? • Understanding and developing better business relationships • Navigating indigenous rights and growing demand for critical minerals in the transition <p>Moderator: Karen Restoule, Vice President, Crestview strategy</p>

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<p>Speakers: Arthur Kwok, Vice President, Treasurer, Ontario Power Generation</p> <p>Mikko Venermo, Senior Manager, Environment and Social Policy and Risk, IFC</p> <p>Susan McGeachie, Co-Founder & Managing Partner / Adjunct Professor (Climate Finance), Global Climate Finance Accelerator</p>	<p>Speakers: James Jenkins, Executive Director, Indigenous Clean Energy Raven Indigenous Impact Foundation (speaker TBC)</p> <p>Eugene Kung, staff lawyer, West Coast Environmental Law</p> <p>Kim Neale, Project Manager and Indigenous Affairs Associate, Natural Assets Initiative (NAI)</p>
<p>16:00 <i>Networking Break</i></p>	
<p>16:15 – A3: ESG data: New challenges, new solutions</p> <ul style="list-style-type: none"> • What do upcoming disclosure regimes mean for data providers? • What would effective ESG data regulation look like? • Social to Scope 3: the next ESG data challenges • How can AI help ESG investing? What are the risks and opportunities of using emerging technologies? <p>Moderator: Sean Hackett , Senior Manager, Energy Transition, EDF</p> <p>Speakers: Bob Dannhauser, Senior Advisor, Shift project</p> <p>Peter Howard, Founder, Zfolio Sarah Greenberg, Managing Director, ESG and Climate Coverage, MSCI</p>	<p>16:15 – B3: Nature-based solutions: Investing in biodiversity</p> <ul style="list-style-type: none"> • Identifying opportunities to support nature • How can investors engage effectively with project managers? • Additionally, permanence, community buy-in: the must-haves for NBS • Addressing credibility challenges in the voluntary carbon markets <p>Moderator: Gina Gambetta, Reporter, Responsible Investor</p> <p>Speakers: Mikko Venermo, Senior Manager, Environment and Social Policy and Risk, IFC</p> <p>Corinne Boone, Group Head, Americas, AirCarbon</p> <p>Andréanne Grimard, Investment Portfolio Director, Colibri Catalyst</p>

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	Kim Neale, Project Manager and Indigenous Affairs Associate, Natural Assets Initiative (NAI)
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17:00 Networking drinks

18:30 End of Day One

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Day Two – Wednesday 18th October

8:00 Registration and refreshments

8:55 Day two chair's opening remarks

*Gina Gambetta, Reporter, **Responsible Investor***

9:00 Interactive roundtable discussions

Mountbatten A

- 1. Unlocking private capital for Coastal NbS projects**
Puninda Thind, Finance Nature Lead, **Climate Champions Team**
- 2. Climate Litigation**
Jennifer King, Partner, **Gowling WLG**
- 3. Methane**
Sean Hackett, Senior Manager, Energy Transition, **EDF**
- 4. ESG and fixed income**
Anne-Marie Gagnon, Senior Principal, ESG, Public Markets, **BCI**

Mountbatten B

- 5. Transition minerals: Upholding human rights and FPIC**
Sharmeen Contractor, Senior Advisor, Market Systems and Investors, **Oxfam**
- 6. Scaling voluntary carbon markets**
Corinne Boone, Group Head, Americas, **AirCarbon**
- 7. Responsible forestry: Deforestation and supply chain**
Pierre Courtemanche, Board member, **Viridis Terra**

10:00 *Networking break*

Stream A	Stream B
<p>10:15 – A4: Canada's banks and the green economy</p> <ul style="list-style-type: none">How have changing energy market dynamics affected sustainability thinking in the Canadian banking sector?	<p>10:15 – B4: Tracking the evolution of proxy voting in Canada</p> <ul style="list-style-type: none">Key takeaways for investors from the 2023 proxy seasonWhat does the recent increase in ESG shareholder proposals mean for responsible investors?

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<ul style="list-style-type: none"> • Where could Canada’s banks do more to support the green economy? • Operationalizing net zero strategies • How can investors engage effectively with banks on net zero and climate finance? • Are Canada’s banks ready to finance climate adaptation? <p>Moderator: Stephanie Chow, Director, Climate Finance & Strategy, GFANZ</p> <p>Speakers: Kyra Bell-Pasht, Director of Research and Policy, Investors 4 Paris</p> <p>Richard Brooks, Climate Finance Director, Stand.earth</p> <p>Jason Taylor, Co-Founder, Board Member - Investment Committee, Foundation of Greater Montreal, Clariti Advisory</p>	<ul style="list-style-type: none"> • Will the publication of CEC’s company benchmark encourage investors to file more shareholder proposals? • Are Canadian investors building escalation pathways on director votes on ESG issues? • Which issues are rising up the agenda in Canada in terms of proxy voting? <p>Moderator: Edd Micklem, VP of Investor Partnerships, Tumelo</p> <p>Speakers: Delaney Greig, Director, Investor Stewardship, University Pension Plan Ontario</p> <p>Alyson Slater, Managing Director, Sustainable Investment, Manulife</p> <p>Matt Price, Executive Director, Investors for Paris Compliance</p> <p>Jacob Cawker, Partner, Gowlings WLG</p>
<p>11:00 – A5: Getting physical: How are investors evaluating and acting on rising physical climate risks?</p> <ul style="list-style-type: none"> • Examples of the latest ways to assess and navigate climate-related physical risks • Physical risks in the Canadian context • Company data, scenarios and modelling 	<p>11:00 – B5: Infra ownership and responsibility for Canadian pension funds</p> <ul style="list-style-type: none"> • Canadian pension funds are among the biggest infrastructure investors in the world – what does it mean to be a responsible owner of infrastructure globally?

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<ul style="list-style-type: none"> • Has TCFD reporting helped move the needle? <p>Moderator: Susan McGeachie, Co-Founder & Managing Partner / Adjunct Professor (Climate Finance), Global Climate Finance Accelerator</p> <p>Speakers: Pierre-Luc Gilbert, Analyst, Climate Risk & Sustainable Investment, CDPQ</p> <p>Sophie Heald, Senior Climate Specialist, Ortec Finance</p> <p>Moin Syed, Manager, Sustainable Investing, OMERS</p>	<ul style="list-style-type: none"> • Infrastructure and net zero – shifting and future-proofing non-green assets to align with the Paris Agreement • Canada’s response to US Inflation Reduction Act <p>Moderator: Jasmine Lagundzija, Senior Consultant, Crestview Strategy</p> <p>Speakers: Fred Di Blasio, CEO and Managing Partner, Longhouse Capital Partners</p> <p>Alex Side, Senior Principal, IMCO Infrastructure</p> <p>Audrie Chad, Director of Research, Global Risk Institute</p>
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11:45 *Networking Break*

<p>12:00 – A6: Emerging markets: Blended finance and engagement</p> <ul style="list-style-type: none"> • How are Canadian investors approaching stewardship in emerging markets? • What are the key barriers to financing climate resilience and mitigation in EM? • What role can Canada play in promoting mechanisms to support innovative finance? • Balancing the risks, opportunities and impact of blended finance structures 	<p>12:00 – B6: Diversity disclosure rules: Canada’s time to push the needle?</p> <ul style="list-style-type: none"> • Could the CSA’s proposed diversity disclosure rules make Canada world leading? • How do the two approaches proposed in the rule compare with other international measures? • How are investors getting their own house in order and engaging with portfolio companies on DEI? <p>Moderator: Elizabeth Dove, Executive director, Global compact network Canada</p> <p>Speakers:</p>
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<p>Moderator: Adhiti Gupta, Senior Development Impact Advisor, FinDev Canada</p> <p>Speakers: Chris Clubb, Managing Director, Convergence Blended Finance</p> <p>Lindsay Wallace, Senior Vice President, Strategy and Impact, MEDA</p> <p>Tim Turner, External Investment Committee Member, ILX fund</p>	<p>Adrian Mitchell, Senior Managing Director, Public Equities, HOOPP</p> <p>Lindsey Walton, Director of Americas, PRI</p> <p>Mitali Prasad, Portfolio Manager & Research Analyst, Trillium</p> <p>Kelly Gorman, EVP Governance Advisory, Kingsdale Advisors</p>
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12:45 *Lunch*

13:55 Fireside chat: Social and environmental sustainability through an indigenous lens

- Indigenous perspective on ESG
- Exploring a different approach to the “S”
- Indigenise corporate Canadas’ approach to engagement with the community
- Scaling indigenous-led solutions

*Wáhiakatste (Wahi) Diome-Deer, Senior Director, **Raven Indigenous Capital Partners / Raven Indigenous Impact Foundation***

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

13:55 Plenary 5: The path ahead: Navigating ESG headwinds

- Has investing sustainably become more challenging for asset owners over the past two years?
- The impact of the war in Ukraine on how responsible investors manage and engage fossil fuel holdings
- Indigenous rights: Overcoming tick boxing and ensuring robust practice
- What is keeping senior leaders at asset owners up at night in 2023?

Moderator: Gina Gambetta, Reporter, **Responsible Investor**

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Speakers:

Kristina Riis, COO, **Investor Leadership Network (ILN)**

Anna Murray, Senior Managing Director, Global Head of Sustainable Investing, **Ontario Teachers' Pension Plan**

Fred Di Blasio, CEO and Managing Partner, **Longhouse Capital Partners**

14:45 Plenary 6: Better together? Collective vs individual engagement

- What are the strengths and weaknesses of the two approaches?
- Progress on Climate Engagement Canada – will we see more national climate initiatives?
- Effectiveness of Canadian Coalition for Good Governance's board engagement program
- How do investors select which initiatives to join?
- How are investors managing stewardship resources effectively to maximise impact

Moderator: Anthony Schein, Director of Shareholder Advocacy, **SHARE**

Speakers:

Catherine McCall, Executive Director, **Canadian Coalition for Good Governance (CCGG)**

Carmen Velasquez, Director, Responsible Investment, **Alberta Investment Management Corporation (AIMCo)**

Oumayma Ouzane, Analyst, Responsible Investment, **Desjardins**

Courtney Birnbaum, Director of Sustainability, **Corbin Capital Partners**

15:35 Chair's closing remarks

Gina Gambetta, Reporter, **Responsible Investor**

15:45 End of conference

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