

**Date:** May 21, 2012

**Location:** S&P Indices, 55 Water Street New York, NY

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### SCHEDULE

4:00 - 4:30PM **Registration**

4:30 - 6:00PM **Program**

#### **Keynote Presentation: Changes in Index Components**

ETFs, mutual funds and institutional money tracking the S&P 500 index are over one trillion dollars and these funds hold more than 10% of each stock in the index. David Blitzer, Chairman of the S&P Index Committee, will describe how the market reacts when stocks are added to, or removed from the index and also explain some of the index maintenance issues the committee faces.

David Blitzer, **Standard & Poor's**, Managing Director

#### **Panel Session: The Future of Indexes and Indexing**

Our panel will discuss what our industry can expect to see down the road in the index realm. Potential changes in regulation, the trends in passive vs. active investing and the rise in customized indexes will all be explored.

#### *Panelists:*

David Krein, **Dow Jones Indexes**, Senior Director

Florian Fischer, **Thomson Reuters**, Global Products

Joseph P. Nardulli, **Northern Trust Company**, Vice President

Arun Singhal, **Russell Indexes**, Senior Product Manager

*Moderator:*

Steve Ellenberg, **MDSL**, Senior Market Data Consultant

### **Overview and Update: ERISA Regulation 404**

#### **The DOL's Final Answers on Fee Disclosures: Do They Create More Questions?**

Beginning this summer, providers (broker-dealers, investment managers, trustees, custodians, and others) to ERISA pension plans will be required to provide detailed information concerning the fees and other compensation they receive directly or indirectly from plans or potentially face prohibited transactions and excise taxes.

Steven W. Rabitz, **Stroock & Stroock & Lavan LLP**, Partner

6:00 - 7:30PM **Reception**

Please contact [Nick Merritt](#) with program and speaker ideas.

*FISD's Index Forum is the day prior to the 10th Annual North American Financial Information Summit, the largest and most established annual event for data management professionals in North America. Financial end-users can attend for free, click [here](#) to find out more.*