

### AGENDA AT A GLANCE

\*All times, speakers and sessions are tentative and subject to change

#### SUNDAY, MARCH 29, 2026

|                |                                    |
|----------------|------------------------------------|
| 1:00 – 3:45 PM | Board of Directors Meeting & Lunch |
| 2:00 – 4:30 PM | Exhibitor Set-up                   |
| 2:45 – 3:45 PM | Co-Chair Meeting                   |
| 3:45 – 4:00 PM | Networking Break                   |
| 4:00 – 5:00 PM | Board & Co-Chair Meeting           |
| 4:30 – 6:30 PM | Registration Open                  |
| 5:00 – 6:30 PM | Welcome Reception in Exhibit Hall  |

#### MONDAY, MARCH 30, 2026

|                     |                                                                                                                                                                                        |
|---------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 – 8:30 AM      | Breakfast in Exhibit Hall                                                                                                                                                              |
| 8:30 – 8:50 AM      | <b>Welcoming Remarks &amp; Chair's Address</b><br><i>Mike Burg, Master of Ceremonies, ISITC Vice Chair; Paul Fullam, ISITC Chair</i>                                                   |
| 8:55 – 9:10 AM      | <b>Keynote Address</b><br><i>Gary Chan, Citadel</i>                                                                                                                                    |
| 9:10 – 9:40 AM      | <b>Keynote Address Panel</b><br><i>Moderator: Sarah Shenton, Access Fintech; Gary Chan, Citadel; Louis Rosato, BlackRock</i>                                                           |
| 9:40 – 10:15 AM     | <b>Networking Break in Exhibit Hall</b>                                                                                                                                                |
| 10:15 – 10:35 AM    | <b>Innovation Forum #1 - DTCC</b>                                                                                                                                                      |
| 10:40 AM – 12:10 PM | <b>Breakout Sessions I</b><br><i>Track A: Corporate Actions</i>   <i>Track B: Settlements</i>                                                                                          |
| 12:10 – 1:05 PM     | <b>Lunch in Exhibit Hall</b>                                                                                                                                                           |
| 1:05 – 1:15 PM      | <b>Standard of Excellence Award</b>                                                                                                                                                    |
| 1:15 – 2:00 PM      | <b>AI at Scale: Real Use Cases Transforming Securities Operations - Can Ops Keep Up?</b><br><i>Michael Sands, Beacon Advisory Partners</i>                                             |
| 2:05 – 2:50 PM      | <b>Cybersecurity: How Are You Innovating to Stay Ahead of Cyber Attacks?</b>                                                                                                           |
| 2:50 – 3:15 PM      | <b>Networking Break in Exhibit Hall</b>                                                                                                                                                |
| 3:15 – 3:35 PM      | <b>Innovation Forum #2</b>                                                                                                                                                             |
| 3:40 – 4:10 PM      | <b>Breakout Sessions II</b><br><i>Track A: Broker Dealer</i>   <i>Track B: Digital Asset</i>                                                                                           |
| 4:15 – 4:45 PM      | <b>Breakout Sessions III</b><br><i>Track A: Investment Manager</i>   <i>Track B: Reference Data &amp; Standards</i>                                                                    |
| 4:50 – 5:35 PM      | <b>Developing the Next Generation of Talent</b><br><i>Moderator: Nandana Penukonda, MFS Investment Management; Emily Dollar, Gardner Resources Consulting, LLC; Paola Suarez, PGIM</i> |
| 5:35 – 7:00 PM      | <b>Cocktail Reception in Exhibit Hall</b>                                                                                                                                              |

#### TUESDAY, MARCH 31, 2026

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|---------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 7:30 – 8:30 AM      | Breakfast in Exhibit Hall                                                                                                                                                                                   |
| 8:00 – 8:30 AM      | <b>Diversity You Don't See: The Art of Well-Being</b><br><i>Jason D. Butler, Lesley University</i>                                                                                                          |
| 8:35 – 8:50 AM      | <b>T+1 in EU/UK: The Global Impact</b><br><i>Barney Nelson, The Value Exchange</i>                                                                                                                          |
| 8:55 – 9:40 AM      | <b>Digital Assets: From Hype to Integration</b><br><i>Moderator: Barney Nelson, The Value Exchange; Charles Carter, State Street Corporation; Marissa McDonald, BNY Digital Assets</i>                      |
| 9:40 – 10:15 AM     | <b>Networking Break in Exhibit Hall</b>                                                                                                                                                                     |
| 10:15 – 10:35 AM    | <b>Innovation Forum #3</b>                                                                                                                                                                                  |
| 10:40 – 11:25 AM    | <b>Breakout Sessions IV</b><br><i>Track A: Regulatory</i>   <i>Track B: Securities Lending</i>                                                                                                              |
| 11:30 AM – 12:15 PM | <b>Breakout Sessions V</b><br><i>Track A: Derivatives</i>   <i>Track B: Technology</i>                                                                                                                      |
| 12:15 – 1:15 PM     | <b>Lunch in Exhibit Hall &amp; Last Visit with Exhibitors</b>                                                                                                                                               |
| 1:00 – 1:15 PM      | <b>Annual Business Meeting</b>                                                                                                                                                                              |
| 1:15 – 1:35 PM      | <b>Innovation Forum #4</b>                                                                                                                                                                                  |
| 1:40 – 2:10 PM      | <b>Breakout Session VI – NEW GROUPS!</b><br><i>Track A: Repo Clearing</i>   <i>Track B: Private Markets</i>                                                                                                 |
| 2:15 – 3:15 PM      | <b>Breakout Sessions VII</b><br><i>Track A: Custodian</i>   <i>Track B: Margin &amp; Collateral</i>                                                                                                         |
| 3:15 – 3:30 PM      | <b>Networking Break</b>                                                                                                                                                                                     |
| 3:30 – 4:15 PM      | <b>Regulatory Whiplash for the Financial Industry: Staying Ahead of Shifting Demands</b><br><i>Moderator: Michele Lieber, FactSet; Thomas Andrew, Brown Brothers Harriman &amp; Co.; Steve Byron, SIFMA</i> |