

Thursday, March 27, 2025

Time	Paper & Speaker	Topic
8:00 – 8:30am ET	Breakfast	
8:30 – 8:35am ET	Welcome and Introduction: Yin Luo, Vice Chairman, QES	
8:35 am – 9:10am ET	<u>Executives v. Chatbots: Unmasking Insights through Human-AI Differences in Earnings Conference Q&A</u> Miao Liu, Assistant Professor of Accounting, Boston College	AI VERSUS HUMANOIDS
9:10 – 9:45am ET	<u>AI-Powered (Finance) Scholarship</u> Mihail Velikov, Assistant Professor of Finance, Penn State University	LLM-ASSISTED RESEARCH
9:45 – 10:10am ET	<u>Systematic Thematic Investing and Risk Management with LLMs, Dynamic Knowledge Graphs, and Graph Learning</u> Yin Luo, Vice Chairman, QES, Wolfe Research	LLM KNOWLEDGE GRAPHS
10:10 – 10:25am ET	AM Break	
10:25 – 11:00am ET	<u>Scaling Core Earnings Measurement with Large Language Models</u> Charles Wang, Professor of Business Administration, Harvard University	AI-POWERED ALPHA
11:00 – 11:45am ET	<u>How AI is Reshaping Portfolio Management</u> Moderated by Yin Luo, Vice Chairman, QES, Wolfe Research <i>Chief AI Officers from leading financial institutions</i>	LESSONS FROM LEADING AI PRACTITIONERS
11:45am – 12:20pm ET	<u>Simulating the Survey of Professional Forecasters</u> Sophia Kazinnik, Research Scholar, Stanford University Digital Economy Lab	AI ECONOMIC INSIGHTS
12:20 – 1:05pm ET	Lunch Break	
1:05 – 1:40pm ET	<u>Beyond Chatbots: Financial Innovation and Data Analysis with Agentic LLMs</u> Nicole Konigstein, Chief AI Officer, quantmate	AUTONOMOUS AGENTIC AI
1:40 – 2:15pm ET	<u>What Does ChatGPT Make of Historical Stock Returns?</u> Shuaiyu Chen, Assistant Professor of Finance, Purdue University	AI-POWERED ALPHA
2:15 – 2:50pm ET	<u>Enhancing Investment Analysis: Optimizing AI-Agent Collaboration in Financial Research</u> Kunpeng Zhang, Associate Professor of Information Systems, University of Maryland	AUTONOMOUS AGENTIC AI
2:50 – 3:05pm ET	PM Break	
3:05 – 3:40pm ET	<u>Corporate Responses to Generative AI: Early Evidence from Conference Calls</u> Guang Ma, Associate Professor of Accounting & Information Systems, Rutgers University Business School	AI-POWERED ALPHA
3:40 – 4:15pm ET	<u>Enhancing Continuous Auditing with LLMs: AI-Assisted Real-Time Accounting Information Cross-Verification</u> Miklos Vasarhelyi, Professor of Accounting Information Systems, Rutgers University	AI-POWERED ALPHA
4:15 – 4:50pm ET	<u>Open-FinLLMs: Open Multimodal LLMs for Financial Applications</u> Xiaoyang Liu, PhD, Columbia University	MULTIMODAL LLMS
4:50 – 5:00pm ET	Closing Remarks: Javed Jussa, Head of Quantitative Research & Services	
5:00 – 6:00pm ET	Cocktail Hour	