

CIBC MELLON

# EMPOWERING CONNECTIONS:

## Inside CIBC Mellon's 2025 Technology and Innovation Showcase

DECEMBER 2025



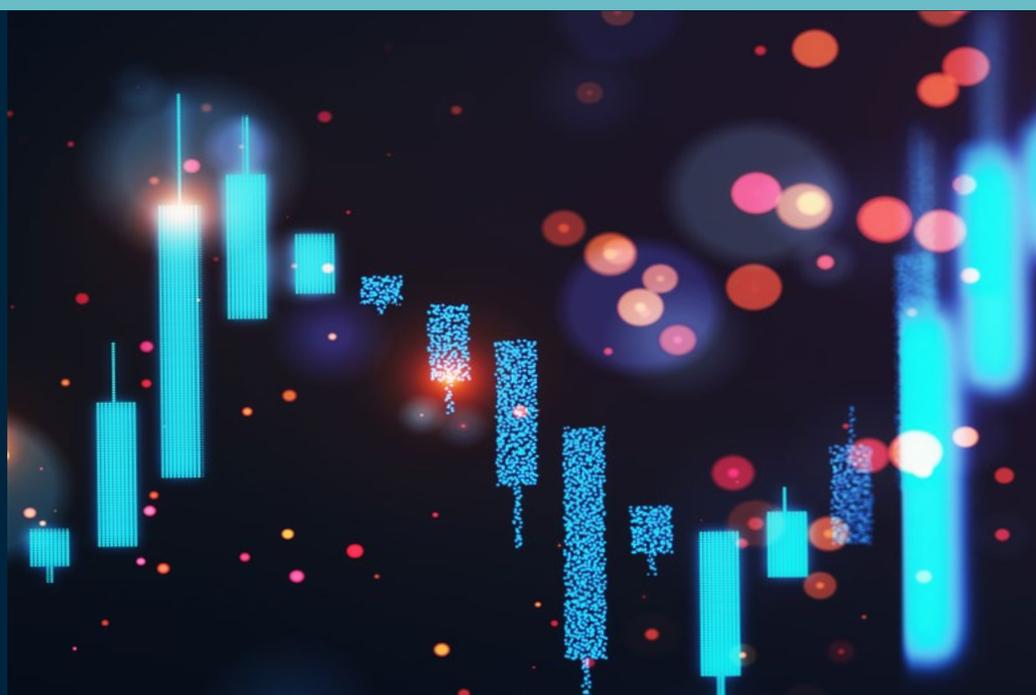


The pace of change across financial services continues to accelerate, and so do the expectations on firms at the centre of Canada's investment ecosystem. That momentum was unmistakable at *CIBC Mellon's 2025 Technology and Innovation Showcase*, where leaders from across data, technology, and institutional operations gathered to compare perspectives, test ideas, and focus on what clients will need next rather than what has worked in the past.



## EXPLORE WITH US

We would be pleased to discuss these themes further, including exploring them in the context of our ongoing Canadian and global research efforts. Please don't hesitate to contact your client manager to arrange a discussion.





## OPENING REMARKS

In his opening remarks, **Mal Cullen**, CEO, CIBC Mellon emphasized that CIBC Mellon sits at the centre of some of the most critical data flows in Canadian investment operations. As he noted, the work happening across the ecosystem today will influence the future of asset servicing, and events like this help keep the industry aligned on the priorities, capabilities, and connections required to move forward.



For CIBC Mellon, the event highlighted the work underway to modernize digital foundations, strengthen data capabilities, and evolve in lockstep with client expectations.

# JASLEEN KAUR SINDHU'S OPENING KEYNOTE

The speaker program began with **Jasleen Kaur Sindhu**, Gartner, who outlined how generative AI, autonomous agents, and machine-led workflows are reshaping financial services. She highlighted the emergence of complex agentic ecosystems, the rise of continuous intelligence, and the need to rethink how humans and machines collaborate. Her keynote set a strong foundation for the rest of the day by stressing how quickly the new intelligence era is advancing.





## LEADERSHIP PANEL WITH CIBC MELLON, MARS CAPITAL PROGRAM AND PORTAGE VENTURES

The first leadership panel, “Innovation, Made in Canada,” brought together **Brian Lee**, CIBC Mellon, **Liam Gill**, MaRS Capital Program, and **Ricky Lai**, Portage Ventures. Their discussion explored the surge of homegrown fintech capability in Canada and the opportunity to rethink operating models by integrating Canadian-built tools and platforms. The panelists noted that institutional clients increasingly expect nimble execution, real-time support, and data delivered with far greater speed and transparency. The conversation made it clear that innovation is no longer theoretical, it is a day to day requirement as client needs continue to evolve.





# TECH TALK WITH SNOWFLAKE AND ELEKS

The showcase's first tech talk, delivered by **Mac Allen**, Snowflake, focused on the transformational impact of large language models on complex analytical tasks. **Alex Shegda**, Eleks, followed with a detailed view of what coding looks like in the age of AI, highlighting the reality of engineering teams working alongside intelligent tools and the implications for security, governance, and modern software architecture.





## FIRESIDE CHAT WITH CIBC MELLON AND APPIAN

The afternoon program featured a fireside chat between **Catherine Thrasher**, CIBC Mellon and **Sanat Joshi**, Appian, which examined how automated workflows are replacing fragmented, email-based processes. Their discussion emphasized the importance of transparent, real-time applications that support continuous improvement and create the foundations for long-term resilience and innovation.



# DISCUSSIONS WITH ALADDIN, FUTUREVAULT AND PLANWORTH

**Björn Schumburg**, part of BlackRock's Aladdin team then outlined how their platform is helping asset managers navigate an increasingly complex operating environment by offering more modularity and optionality. That was followed by **Daniel Kenny**, FutureVault who examined how digital vaults are becoming intelligence engines that unify advisor and client information in secure, streamlined environments. **James Fraser**, Planworth closed the tech talks with a look at how trust, technology, and hybrid guidance models are reshaping the advisory experience and deepening engagement for clients.





## PANEL DISCUSSION WITH CIBC MELLON, CANADIAN PENSION PLAN INVESTMENTS AND CAPCO

The closing panel brought together **Alastair Angus**, CIBC Mellon, **Mike Leader**, CPPIB Investments, and **Suzanne Muir**, CAPCo, for a discussion on balancing short term demands with long term vision. They spoke about the need to build operational foundations that support safe experimentation, the realities of adopting AI within highly regulated institutional environments, and the importance of prioritizing architecture over abstract strategy. Alastair noted that tools are advancing faster than people can keep pace, which means the industry's responsibility is to build the talent, data discipline, and operational maturity required to absorb those advancements responsibly.



Throughout the day, the showcase reinforced the strength and momentum of Canada's technology and investment operations ecosystem. For CIBC Mellon, the event highlighted the work underway to modernize digital foundations, strengthen data capabilities, and evolve in lockstep with client expectations. It was also a reminder that innovation happens between organizations, not within one firm alone, and that bringing together diverse perspectives accelerates progress for everyone involved.

CIBC Mellon extends its appreciation to all attendees, speakers, and contributors who helped shape the conversations and insights shared throughout the event.

As Mal Cullen noted in closing, this is a pivotal moment for the industry. The volume and velocity of institutional data continue to grow, and the demands placed on investment operations are rising just as quickly. Events like this help the ecosystem stay ahead of that curve, align around shared challenges, and build what clients will need next.



A special thank you goes to this year's showcase sponsors, including **Aladdin by BlackRock**, **FutureVault**, **LTIMindtree**, and **Snowflake**, whose support helped make the day possible.

## FOR MORE INFORMATION

CIBC Mellon is pleased to engage with clients on this front and continue the conversation. Please contact your Client Manager if you would like more information.

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