

# ENERGY TRANSACTION & TRADING FUNDAMENTALS

*For Bi-Lateral, OTC, Exchange and Wholesale Electricity Market Transactions*

October 19-20, 2020  
Online | Central Time



*"This course is a great learning tool for intro to hedges - it goes a bit deep for someone like me who has very little understanding but I took a lot of notes and the presentation itself will help me explore topics and complete some self-learning on my own."*

Controller, Key Capture Energy, LLC

RELATED EVENT:

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This course will provide the fundamental knowledge necessary to understand these energy transaction and trading principles, how they relate to each other and what is necessary to optimize their functions. It will start with an overview of power system structures, price drivers and regulatory oversight. The program will then look at the types of instruments that can be used in bilateral, over-the-counter, exchange-based and wholesale electricity market transactions. A review of hedging, with the goal of minimizing risk, will explore the strategy and tactics of these programs.



EUCI is authorized by IACET to offer 1.0 CEUs for the course. Participants must log on each day and be in attendance for the entirety of the course to be eligible for continuing education credit.

## LEARNING OUTCOMES

- Review power system elements in a transactional context
- Identify the regulatory and oversight bodies and their roles relating to transactions and trading
- Assess multiple energy markets and transaction platforms
- Evaluate the price drivers associated with power transactions
- Discuss energy transacting, trading and hedging elements
- Examine risk oversight, measurement and monitoring concepts
- Review case studies of trading and transacting approaches that failed
- Assess trading and transacting best practices
- Build a simple, coherent risk management model

## INSTRUCTORS

**Scott Wrigglesworth**, Director of Analytics and Strategy, Ascend Analytics  
**Michael Ballow**, Director of Analytics and Strategy, Ascend Analytics

# INTERMEDIATE ENERGY TRADING, HEDGING, PORTFOLIO & RISK MANAGEMENT

October 20-21, 2020  
Online | Central Time

## RELATED EVENT:

**ENERGY TRANSACTION &  
TRADING FUNDAMENTALS**  
October 19-20, 2020 | Online



*"Cleared a lot of the fog from risk analysis."*

Electric System Operator – Power, REU

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The content explains the various tools used to control the associated risks. It also details how these contracts work, how and when they should be used, and how they are priced. Case examples and problem-solving illustrations optimized for power and natural gas trading are used throughout the course to enhance the understanding of the material. It will identify and illustrate best practices associated with the sound measurement of uncertainty and building solid risk metrics for portfolio management and risk management through optimal hedging and solid hedging program design.



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## LEARNING OUTCOMES

- Review portfolio management in traditional utility/balancing area vs OTC, Exchange and ISO-based market transactions
- Assess market distinctions and price driver dynamics
- Discuss relationships between power market trading and hedging
- Examine market, credit and counterparty risk management best practices
- Evaluate energy trading compliance programs and their application in the current regulatory environment
- Demonstrate meaningful uncertainty framework for developing utility and power portfolio hedging programs
- Build, design, develop and implement a hedge program

## INSTRUCTORS

**Scott Wrigglesworth**, *Director of Analytics and Strategy, Ascend Analytics*  
**Michael Ballow**, *Director of Analytics and Strategy, Ascend Analytics*



To Register Click Here, or

# PARTICIPATION DETAILS

**Mail Directly To:**

PMA Conference Management  
405 Highview Rd  
Englewood NJ 07631  
201 871 0474  
Fax 253 663 7224  
register@pmaconference.com

EUCI will use Microsoft Teams to facilitate participation in the upcoming event. Attendees do not need to have an existing Teams account to participate in the broadcast. The course will play in attendee's browser. When attendees sign on, their microphones are typically muted. Attendees should keep their mic muted until such time as it's needed to ask a question. During the event, participants will have the option of using a microphone to speak with the room and ask questions, or type in any questions via the chat window and our online administrator will relay your question to the instructor.

- Each attendee will receive an event invitation by e-mail, which will include one link to sign on for each half-day of the event (i.e., three links for a 1 1/2 day event). The appropriate link must be used to join each half-day event segment at the appropriate time.
- The remote meeting connection will open approximately 30 minutes before the start of the course. We encourage attendees to connect as early as possible in case of unforeseen problems.
- **Recording:** Each event is recorded, and will be available for three business days. For registrants only.

## PLEASE SELECT

**BUNDLE PRICE: ENERGY TRANSACTION & TRADING FUNDAMENTALS AND INTERMEDIATE ENERGY TRADING, HEDGING, PORTFOLIO & RISK MANAGEMENT ONLINE COURSES**

OCTOBER 19 – 21, 2020: US \$2,395 (Single registration)

**ENERGY TRANSACTION & TRADING FUNDAMENTALS ONLINE COURSE ONLY:** OCTOBER 19 – 20, 2020: US \$1,295 (Single registration)

**INTERMEDIATE ENERGY TRADING, HEDGING, PORTFOLIO & RISK MANAGEMENT ONLINE COURSE ONLY:**

OCTOBER 20 – 21, 2020: US \$1,295 (Single registration)

Discounts: Groups of Five: 20%; Ten: 30%  
Call 201 871 0474 to register groups and receive discounts.  
Incremental registrants charged at the discounted rate.  
Separate connection available for each registrant to facilitate social distancing.

Print Name	Job Title		
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Phone	Email		

### CREDIT CARD INFORMATION

Name on Card	Billing Address
Account Number	Billing City
Exp. Date	Billing State
Security Code (last 3 digits on the back of Visa and MC or 4 digits on front of AmEx)	Billing Zip Code/Postal Code

**OR** Enclosed is a check for \$ \_\_\_\_\_ to cover \_\_\_\_\_ registrations.

#### Substitutions & Cancellations

Your registration may be transferred to a member of your organization up to 24 hours in advance of the event. Cancellations must be received on or before September 18, 2020 in order to be refunded and will be subject to a US \$195.00 processing fee per registrant. No refunds will be made after this date. Cancellations received after this date will create a credit of the tuition (less processing fee) good toward any other EUCI event. This credit will be good for six months from the cancellation date. In the event of non-attendance, all registration fees will be forfeited. In case of course cancellation, EUCI's liability is limited to refund of the event registration fee only. For more information regarding administrative policies, such as complaints and refunds, please contact our offices. EUCI reserves the right to alter this program without prior notice.

