

# Derivatives

The derivatives marketplace is global and requires an integrated team with global knowledge.

## Experience

- Developing leading-edge derivative-based products for investment funds, including alternative funds.
- Advising derivatives participants on compliance with new global derivatives rules and regulations and developing compliance policies.
- Obtaining extensive regulatory relief to permit a complex derivatives-based investment product to be offered to retail investors in Canada.
- Worked with the Ontario Securities Commission to effectively change the law regarding the rehypothecation of collateral posted by investment funds for their derivatives positions.
- Obtaining relief to permit Canadian mutual funds to enter into swaps mandated for central clearing by the U.S. Commodity Futures Trading Commission and by the European Securities and Markets Authority.
- Assisting issuers of contract for differences with respect to retail offerings in Canada, including prospectus requirements and exemptions.
- Acting for a U.K. CFD provider to obtain the first non-resident CFD dealer approval in Canada.
- Acting for dealers in obtaining novel restricted dealer registration for block trades in futures and options on an exchange that is a designated contract market overseen by the CFTC.
- Developed, advised and negotiated all derivative agreements on behalf of the largest Canadian residential mortgage securitization conduit.
- Acting for global commodity producers to establish hedging programs.
- Assisting clients with establishing online derivatives trading platforms using distributed ledger technology.
- Developing risk management programs for market participants, including preparing best practices and policies for their boards and management.
- Addressing complex collateral issues with Canadian and global derivatives participants.
- Facilitating ongoing dialogues with Canadian securities regulators on policy concerns involving novel derivative instruments.

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