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IMAP 2018 PORTFOLIO MANAGEMENT CONFERENCE AGENDA

2 AUGUST 2018

SUPPORTING SPONSORS



PORTFOLIO CONSTRUCTION
ASSET ALLOCATION GAME &
POST EVENT DRINKS SPONSOR



PRINCIPAL SPONSOR

Time	Topic & Speaker
	MC Rebecca Jacques
8:45	Conference welcome address Toby Potter
9:00	Making investment promises you can keep Tom Bignill (Chair) – Mason Stevens Dan Miles – Innova Asset Management Alex Hone – Atrium
9:30	Macquarie Keynote - Using proprietary research data to deliver to your clients' needs in a changing environment Sherise Mercer – Macquarie Virtual Adviser Network
10:00	Portfolio Construction Asset Allocation Game – Round 1 Oliver Trusler – Schroders
10:20	Morning Tea
10:40	Vertical Dis-integration – Leaving the mothership Paul Saliba (Chair) – Evolutionary Portfolio Services David Wright – Zenith Alex Donald – Ironbark
11:10	The role of sector exposure in equity portfolios Cesar Farfan – Perennial Jerome Lander – Pro Capital Charles Stodart – Zurich
11:40	Practical application of International Equity exposure in MAs Nigel Douglas (Chair) – Douglas Funds Consulting Nik Kritikos – Saxo Markets Jonathan Shead – State Street Global Advisers
12:15	Portfolio Construction Asset Allocation Game – Round 2 Oliver Trusler – Schroders
12:30	Lunch
1:25	IMAP 2018 Managed Account Awards Toby Potter
1:35	Meeting Retirement Income Objectives through Managed Accounts Michael Karagianis (Chair) – Private Investment Consulting Lukasz de Pourbaix – Lonsec Investment Solutions Raf Choudhury – State Street Global Advisers
2:05	Portfolio Managers, the next wave Bianca De Melo – Macquarie Anne Hamieh – Vanguard

2:35	Outside the mainstream – looking for particular portfolio characteristics Angela Ashton (Chair) – Evergreen Consultants Andrew Lill – Morningstar Steve Merlicek – Actavis Investment Advisors Dr Tony Rumble – The Wealth Partnership
3:05	Afternoon tea
3:25	Portfolio Construction Asset Allocation Game – Round 3 Oliver Trusler – Schroders
3:50	2023: What will Investment Management look like for Advisers Dominic McCormick (Chair) – Investment Consultant Martin Morris – Praemium Matt Heine – Netwealth
4:20	Investment themes in these uncertain times and Portfolio Construction Asset Allocation Game – Panel discussion and winners Brad Matthews (Chair) – Brad Matthews Investment Consulting Oliver Trusler – Schroders David Bassanese – Betashares
4:55	Closing remarks Toby Potter
5:05	Close Drinks for 60 mins

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