portfolio construction | investment markets SUMMIT

The road(s) to recovery

Tuesday 17 February 2009, 8.45am - 6.00pm | Australian Technology Park, Sydney NSW

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Join us and our faculty of international and local experts for a high quality, high value, intelligent discussion of key investment markets and their risks and opportunities in 2009/2010 including the:

- outlook for the global economy in 2009/10
- key investment market opportunities and risks
- current & preferred economic policy settings and implications
- key economic and investment market signposts to watch for
- implications for investment portfolios

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Featuring...

DR. JACK GRAY
University of Technology
Sydney, Australia

JONATHAN PAIN
HFA Asset Management
Australia

CHARLIE LANCHESTER
Perpetual Investments
Australia

HAMISH DOUGLASS
Magellan Financial Group
Australia

ROB GENSLER
T.Rowe Price
UK/USA

ALLAN CONWAY
Schroders
UK

ANTHONY MICHAEL
Aberdeen Asset Management
Singapore

ANDREW PARSONS
Resolution Capital
Australia

SIMON EAGLETON
Mercer Investment Consulting
Australia

TIM FARRELLY
farrelly's
Australia

Plus...

GRAHAM McDEVITT | Macquarie Funds Management | USA
RICHARD GILBERT | IFSA | Australia
DR. JUSTIN WOOD | Barclays Global Investors | Australia
JO-ANNE BLOCH | FPA | Australia

Program, moderated by Graham Rich, Publisher, PortfolioConstruction Forum

9.00am — Theme 1 - The current status and 2009/2010 outlook for the global economy

Highly regarded investment specialists **Dr Jack Gray** (previously SunSuper CIO and co-head of asset allocation at GMO, now Adjunct Professor at the University of Technology, Sydney) and **Jonathan Pain** (Investment Strategist with HFA Asset Management) share their unique perspectives on what 2009/2010 will bring for the global economy. Both correctly alerted us – several years ahead – to the current global financial crisis. At the Summit, we'll hear what they think is left to unfold and the possible road(s) to recovery.

Jack and Jonathan will then remain for the day, as Inquisitors for our Theme 2 speakers, as we traverse the outlook for global markets.

10.30am — Morning Tea

11.00am — Theme 2: The current status and 2009/2010 outlook for global markets (Part 1)

Australian Equities – Charlie Lanchester
Portfolio Manager, Perpetual Investments
Global Equities (an Australian-based perspective) – Hamish Douglass
Chairman, Magellan Financial Group
Global Equities (a UK- and US-based perspective) – Rob Gensler
Portfolio Manager Global Equity Strategy, T.Rowe Price
Global Emerging Markets (a UK-based perspective) – Allan Conway
Head of Emerging Market Equities, Schroders

1.30pm — Lunch

2.15pm — Theme 2: The current status and 2009/2010 outlook for global markets (Part 2)

Global Fixed Interest and Credit (a US-based perspective) – Graham McDevitt
Head of Global Strategy, Macquarie Funds Management
Global Fixed Interest (an Asian-based perspective) – Anthony Michael
Head of Fixed Income Asia, Aberdeen Asset Management
Global Property (an Australian-based perspective) – Andrew Parsons
MD & Senior Portfolio Manager, Resolution Capital

4.10pm — Theme 3: The current status and 2009/2010 outlook for financial planning and funds management

Chaired by **Richard Gilbert**, CEO, Investment and Financial Services Association
Current and preferred economic policy settings and implications – Dr Justin Wood, Head of Strategic Solutions & Client Advisory Group, Barclays Global Investors Australia
Consumer opinions about investing – Jo-Anne Bloch
CEO, Financial Planning Association

5.00pm — Theme 4: Key takeouts and portfolio implications

Our final session pulls together the day's discussion, highlighting key takeouts and portfolio implications. **Simon Eagleton**, Business Leader, Mercer Investment Consulting Australia, gives an insto perspective, while **Tim Farrelly**, Principal of asset allocation house, farrelly's, gives the retail/mezzanine perspective.

6.00pm — Networking Drinks — Ends 7.00pm

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