
## AGENDA

| Time | Description |
|---|---|
| 8:50am | **Welcome** |
| 9:00am | ***20 Charts for an optimistic 2023***<br>A global perspective on current macroeconomic trends including interest rates and inflation and their long-term implication and impact on various asset classes, including residential, office, retail and industrial property.<br>Presenter: **Quay Global Investors brought to you by Bennelong Funds Management**<br>Estimated CPD areas: **General** |
| 9:45am | ***Bonds are Back***<br>Please join Anthony Kirkham, Head of Investment Management and Portfolio Operations and Jonathon Costello – Client Service Executive at Western Asset who will share the team's latest outlook for fixed income and credit including:<br>- Outlook for domestic and global markets including growth, inflation expectations and interest rate outlooks<br>- The impact of China's reopening on global fixed income markets and the Australian economy<br>- Sector allocation opportunities<br>- Corporate credit conditions including fundamentals, spreads and technical factors<br>Presenter: **Western Asset brought to you by Franklin Templeton Australia**<br>Estimated CPD areas: **General**<br><br>***Sustainable investing within a changing style environment***<br>The presentation will focus on Martin Currie as an 'Active' manager, playing a "Core' role within Australian equities. Martin Currie is a leading Value manager and the Focus of the presentation is the Ethical Income Fund which aims to deliver a high- and growing-income stream by investing in quality, ethically screened Australian listed companies.<br>Martin Currie will also cover risks, opportunities and demonstrate how an investment fund can incorporate both the Value style and Ethical (Sustainability) into process and portfolio construction.<br>Presenter: **Martin Currie brought to you by Franklin Templeton Australia**<br>Estimated CPD areas: **General** |
| 10:45am | **Morning tea** |


| Time | Description |
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| 11:00am | ***Global REITs – Time to build exposure to the real estate value play***<br>Andrew Parsons is the founder and chief investment officer of Resolution Capital – a highly rated specialist global listed REITs and Real Assets asset manager with over $14 billion in AUM. Andrew's experience in global financial and property markets spans over three decades.<br>In this session, Andrew will share insights into the global listed real estate sector, including a deep dive into the fundamentals of the sector amid the recent sell off, the importance of liquidity, and why he believes now is an opportune time to build exposure. Andrew will also provide an insight into how Resolution Capital identifies listed real estate investments across the world, the challenges facing office properties, the sectors the team have the highest conviction in, and examples of some unique real estate assets in the Resolution Capital portfolio.<br>Presenter: **Resolution Capital brought to you by Pinnacle**<br>Estimated CPD areas: **General** |
| 11:45am | ***Why allocating capital in this new paradigm will require a balanced yet agile approach***<br>How you made money in the past won't be how you make it in the future. While history does not repeat itself, it does rhyme and your ability to manage emerging issues and capitalise on market opportunities requires a balanced yet agile approach. We'll cover what CFS sees as the key local and global movements coupled with how we are thinking differently about portfolio construction to enable client growth in this new paradigm.<br>Presenter: **Colonial First State**<br>Estimated CPD areas: **General** |
| 12:15pm | ***Generating Reliable Retirement Income***<br>Retirement is different. Different objectives, different measures of success, and different risks require a different approach to portfolio construction. This session, delivered jointly by Andrew Lowe (Head of Technical Services, Challenger) and Andrew Fraser (Principal, Merlon Capital Partners), aims to practically make the case for a different approach to asset allocation in retirement.<br>During this session, Andrew Lowe will demonstrate the benefit of an allocation to a guaranteed or market-linked lifetime stream within retirement portfolios. We understand that clients come in all shapes and sizes so we'll show this benefit in a diverse range of client scenarios based on real client applications.<br>Andrew Fraser will then highlight some important portfolio construction considerations for retiree income generation. In particular, how investing in a portfolio of under-valued companies, combined with a risk reduction overlay can provide an opportunity to rethink asset allocation for retirees. Don't miss this opportunity to gain valuable insights that could improve client outcomes today.<br>Presenters: **Merlon and Challenger brought to you by Fidante**<br>Estimated CPD areas: **Technical Competence** |
| **1:00pm** | **Summary/close and lunch** |