

INVESTMENTS THE VIRTUAL HORIZON

glacier
by Sanlam

Thursday, 2 April 2020

07:30 – 09:00	Arrival and registration at Sanparks Golden Gate Hotel	
09:00 – 09:10	Welcome	Rocco Carr
09:10 – 09:50	Economic Overview	Francois Stoffberg
	PANEL DISCUSSION	
09:50 – 10:20	The rise of U.S. superstar firms and the implications for investors	Schroders and Sarasin
10:20 – 10:50	Are all opportunities abroad, or do SA stocks offer enough value for SA investors?	Fairtree and Blue Alpha
10:50 – 10:55	A new way of supporting the rhino	Marthinus van der Nest
10:55 – 11:25	Comfort Break	Foyer
	ROUND ROBINS	
11:25 – 11:50	The value of quality experience	Iain Power (Truffle)
11:50 – 12:15	Understanding risk in uncertain times	Eben Karsten (Matrix)
12:15 – 12:40	Finding opportunities in a world of uncertainty	Omri Thomas (Abax)
12:40 – 13:30	Networking lunch	Dining Area

ROUND ROBINS continue

13:30 – 13:55 Embrace the technological revolution to create efficiencies in your practice Tiaan Thiart (Glacier)

13:55 – 14:20 A differentiated approach to enhance your investment return Murray Winkler (Laurium Capital)

14:20 – 14:45 Understanding the pitfalls of the GEPF during the advice process Dinash Pillay (Glacier)

14:45 - 15:15 Comfort Break Foyer

PANEL DISCUSSION

15:15 – 15:45 Can artificial intelligence replace active fund management? Glacier and 36One

15:45 – 16:10 Does credit in income funds imply a greater risk than bonds? BCI and Coronation

THE BIG CLASH

16:10 – 17:00 The importance of an economist in fund Management Stanlib, Prudential & Marriot

17:00 – 18:00 Leisure Time

19:00 – 00:00 Dinner and Networking

Friday, 3 April 2020

07:30 – 07:35	Welcome	Cathy Lammas
07:35 – 08:00	The relevance of platforms in a technological age	Werner Lotriet
08:00 – 08:25	Using endowments and sinking funds as estate planning tools	Linda Blom
	PANEL DISCUSSION	
08:25 – 08:55	Quality vs Value as style. Is sentiment changing?	Allan Gray and Investec
08:55 – 09:25	Importance of having hedging background in long only funds	(Bateleur Capital, and Sanlam Investments)
09:25 – 09:50	Comfort Break	Foyer
09:50 - 10:15	Income stream management during retirement	Rainier van der Nest
10:15 – 11:45	Ethics Workshop	Juanita Vorster
11:45 – 12:45	The role of the media as ethical watchdog	Conrad Koch
12:45	Close	