

## AGENDA: 12 MAY 2025 | ONLINE ZOOM WEBINAR ONLY

### Monday, 12 May 2025 – Online Zoom Webinar Only

Day 1	Theme	Presenting Company	Speakers	Topic
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 09:25	Global Equity Views & Opportunities <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	<b>Contrarius Investment Management</b>	Simon Raubenheimer	Contrarian Investing in a changing world
09:25 – 09:45	Global Equity Views & Opportunities <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	<b>Fundsmith</b>	Greville Ward	Do less, weigh less, drink less, spend more
09:45 – 10:25	Global Equity EM Views & opportunities. <i>Moderated by Tavonga Chivizhe, Apex Investment Consulting SA</i>	<b>Riscura Solutions (UK)</b> <b>Sands Capital</b>	Jarred Glansbeek Eric Black	The China market: how attractive is the opportunity? Decoupling & Diversification: The Case for Emerging Markets
10:25 – 10:45	Global Index <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	<b>Ginsglobal Index Funds</b>	Anthony Ginsberg	Global Index & Market Outlook
10:45 – 11:05	Global property views and positioning <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	<b>Reitway Global &amp; Hoya Capital</b>	Greg Rawlins & David Auerbach	The ascent of US REITs: The key allocation in Global Property Portfolios
<b>11:05 – 11:20</b>	<b>TEA BREAK</b>			
11:20 – 12:00	Global Equity Views & Opportunities <i>Moderated by Leigh Kohler, INN8 Invest</i>	<b>Lindsell Train</b> <b>Martello Asset Management</b>	Ben van Leeuwen Gary Hill	The right to win Does TINA still apply...?
12:00 – 12:40	Global Equity Views & Opportunities <i>Moderated by Michael Dodd, Morningstar</i>	<b>GQG Partners/ Southern Right Capital</b> <b>Guinness Global Investors</b>	Kevin Osten Dr Ian Mortimer	TBC Why Dividends Matter
12:40 - 13:00	Global Equity – Value <i>Moderated by Andreea Bunea, Old Mutual Multi Managers</i>	<b>T. Rowe Price</b>	Oliver Alston	Global Value Equity
13:00 - 13:40	Global Fixed Income <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	<b>Fairtree</b> <b>Allspring Global Investments</b>	Paul Crawford Janet Rilling	Global Credit: This time it's going to be different (again) Navigating the current Global Fixed Income markets
<b>13:40 – 13:45</b>	<b>DAY 1 – ONLINE ONLY CONFERENCE CLOSE</b>			