

AGENDA: 13 MAY 2025

Tuesday, 13 May 2025 – In person (and live streamed) at The Maslow Hotel, Time Square, Menlyn Pretoria				
Day 2	Theme	Presenting Company	Speakers	Topic
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 10:15	Global Equity Views & Opportunities <i>Moderated by Sameer Singh, Glacier</i>	Mazi Asset Management Coronation Fund Managers Ranmore Funds BlueAlpha Investment Man.	Andreas van der Horst Neil Padoa Sean Peche Richard Pitt	Wealth is created by investing in quality global companies Navigating Concentrated Markets: Finding Stock Picking Opportunities Beyond the Obvious Opportunities in Global Equities Cheap is not value
10:15 – 11:10	Multi Asset Views & positioning <i>Moderated by Nadine van Taak, Analytics Consulting</i>	Fairtree Sasfin Asset Managers Vunani Fund Managers	Chantelle Baptiste Raphi Rootshtain Rory Spangenberg	Trump, Turmoil and Opportunity Navigating the End of the World: Investing through the Apocalypse Active management in uncertain times – why the index is no longer your friend!
11:10 – 11:30	Global & Domestic property views and positioning	Sesfikile Capital	Evan Jankelowitz	From Struggle to Strength – The South African Real Estate Revival
11:30 – 12:15	TEA BREAK / LUNCH BREAK			
12:15 – 13:25	Fixed Income Views and Opportunities <i>Moderated by Jonel Matthee Ferreira, Cogence</i>	Cadiz Asset Management Methodical Investment Management Visio Fund Management Oakhaven Capital	Sidney McKinnon JP du Plessis Jonathan Myerson Bruce Thistlewhite	Fixed Income Dynamics – A critical look Yield and future performance are not the same thing Unlocking Income: A Proven Flexible Strategy for South African Fixed Income Income Funds – are they inflation proof?
13:25 – 14:20	SA Domestic Equity Views and opportunities <i>Moderated by Pierre de Klerk, Apex Investment Consulting SA</i>	All Weather Capital Bateleur Capital Northstar Asset Management	Shane Watkins Warren Riley Marco Barbieri	How is it GNUing? Navigating Domestic Equities: Current Views and Future Prospects SA Equity in 2025: Where Strategy Meets Opportunity
14:20 – 14:40	Global Equity	Credo	Jarrold Cahn	Global Equity Views and opportunities
14:40 – 15:00	Guest Speaker <i>Introduced by Eugene Braak</i>	Guest Speaker Credo	Deon Gouws	Did I Ever Tell You How Lucky You Are?
15:00 – 15:05	DAY 2 - CONFERENCE CLOSE			
15:05 – 16:30	NETWORKING DRINKS & SNACKS			