

BCI GLOBAL INVESTMENT CONFERENCE



AGENDA: 14 MAY 2025

Wednesday, 14 May 2025 – In person (and live streamed) at The Maslow Hotel, Time Square, Menlyn Pretoria

Day 3	Theme	Presenting Company	Speakers	Topic
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 09:45	Multi Asset Views & positioning <i>Moderated by Florbela Yates, Equilibrium</i>	Granate Asset Management Centaur Asset Management	Catherine Blersch Nick de Vos	Free markets and baby turtles Spoilt for Choice
09:45 – 10:40	Fixed Income Views and Opportunities <i>Moderated by Pierre de Klerk, Apex Investment Consulting SA</i>	Portfolio Metrix Laurium Capital Aluwani Capital Partners	Philip Bradford Shwebi Gqosha Conrad Wood	How to generate consistent returns in an inconsistent world In a year of uncertainty, what are the 3 things we are certain about in the SA fixed income market? Fixed Income Outlook – opportunities & risks
10:40 – 11:10	TEA BREAK			
11:10 – 12:05	Global Equity Views & Opportunities <i>Moderated by Roeloff Horne, Miton Optimal</i>	Balondolozzi Investment Services Flagship Asset Management MIPlan / ThinkCell	Fannuel Tigere Philip Short Tony Bell	In 2022, both global bonds and stocks declined. Could this happen again? Navigating Volatile Markets Understanding the rotation in equity markets & the impact of a potential dollar devaluation
12:05 – 12:45	Global Fixed Income and SA Credit <i>Moderated by Trevor Garvin, Nedgroup Investments</i>	Ninety-One Saffron Wealth Fund Management	Stephen Naidoo Brandon Quinn	The investment case for SA credit Opportunities in Global Fixed Income
12:45 – 13:55	Domestic Equity Views and opportunities <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	36ONE Asset Management Allan Gray Anchor Asset Management Investec Investment Management	Cy Jacobs Siphesihle Zwane Mike Gresty Barry Shamley	Key Themes Influencing Our Decision Making The Looming Tails Back to investing in the slow lane Beyond blue chips
13:55 – 14:00	LUNCH DAY 3 - CONFERENCE CLOSE			

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