

AGENDA: 11 MAY 2026

Monday, 11 May 2026 – In person (and live streamed) at The Lord Charles, Somerset West, Cape Town			
Day 1	Theme	Presenting Company	Speakers
09:00 – 09:05	Opening and Welcome	Apex Investment Consulting SA	Eugene Braak
09:05 – 10:00	Multi Asset Views & Positioning	Granate Asset Management Centaur Asset Management Contrarius Investment Management	Henno Vermaak Nick de Vos Simon Raubenheimer
10:00 – 10:50	Fixed Income Views and Opportunities	PortfolioMetrix Anchor Asset Management Methodical Investment Management	Philip Bradford Nolan Wapenaar JP du Plessis
10:50 – 11:15	TEA BREAK		
11:15 – 12:10	Global Equity Views & Opportunities	MIPlan / ThinkCell All Weather Capital Northstar Asset Management	Tony Bell Neal Smith Adrian Clayton
12:10 – 13:05	Global Fixed Income and SA Credit	Ninety-One Aluwani Capital Partners Fairtree	Adam Furlan Conrad Wood Paul Crawford
13:05 – 13:50	LUNCH & NETWORKING		
13:50 – 14:30	Domestic Equity Views and Opportunities	Vunani Fund Manager Oyster Catcher Investments	Jami Jephthas Mark du Toit
14:30 – 15:25	Global Equity Views & Opportunities	Ranmore Funds BlueAlpha Investment Management Artisan Partners	Sean Peche Richard Pitt Ryan Wood
15:25 – 15:30	DAY 1 - CONFERENCE CLOSE		
15:30 – 20:00	NETWORKING DRNKS, ENTERTAINMENT & EARLY DINNER		