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2020's: The era of digital transformation and climate action.

Investment theme: The famous seven.

The COVID-19 crisis triggered a turning point in history and suggests that the peak of globalisation is over. An economic system that relied on worldwide production and long supply chains is morphing into one that will be less interconnected. A way of life driven by unceasing mobility is shuddering to a stop.

Apple, Airbnb, Alphabet, Amazon, Nvidia, Meta and Tesla are considered the seven most innovative companies during this era. These are companies who are strongest at innovation most value advanced analytics, digital design and technology platforms.

2010's: The rise of tech giants and sustainable investing.

Investment theme: American "mega caps".

Recovery from the financial crisis resulted in a period of fiscal stimulus measures and investments in equities.

It was a period of tech dominance and the rise of technology giants and the digital economy (Instagram, Netflix, Booking.com, Spotify, Uber, Lyft and TikTok).

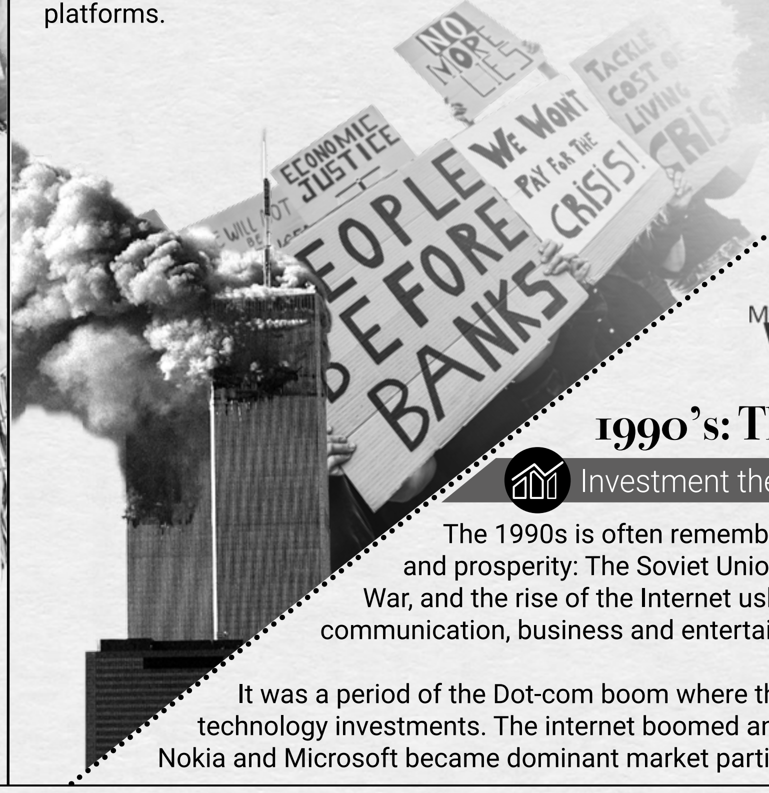
Global warming and climate change, socially responsible investing trended towards companies that positively impacted the environment by reducing emissions or investing in sustainable or clean energy sources.

2000's: The dot-com bubble and financial turmoil.

Investment theme: Emerging markets / commodities.

Speculative investments in real estate resulted in a housing bubble in the USA that caused a housing crisis and one of the most severe worldwide economic crisis since the Great Depression.

However, during this period there was further technological resurgence with the growth in internet and biotechnology sectors. The iPod was launched – a devise that would put a 1000 songs in your pocket, the camera phone by Motorola, the iPhone – the first smart phone to make use of a multi-touch interface, YouTube was launched as well as Facebook and other such platforms.

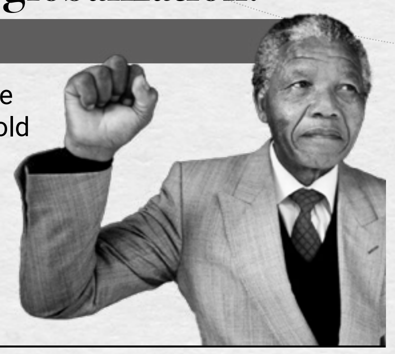


1990's: The internet boom and globalization.

Investment theme: American tech.

The 1990s is often remembered as a decade of relative peace and prosperity: The Soviet Union fell, ending the decades-long Cold War, and the rise of the Internet ushered in a radical new era of communication, business and entertainment.

It was a period of the Dot-com boom where there was a surge in internet and technology investments. The internet boomed and companies such as Google, Nokia and Microsoft became dominant market participants.



CHRONICLES

INVESTMENT FORUM 2024

1950's: The dawn of innovation.

Investment theme: European stocks.

If you were around in the 1950s you probably saw a tremendous boom in electrical devices, and gadgets in and around the house, i.e. why people around this time saw a huge influx in advertising. Many people have looked back at the 50s as a golden era, a time period in which the quality of life drastically improved.

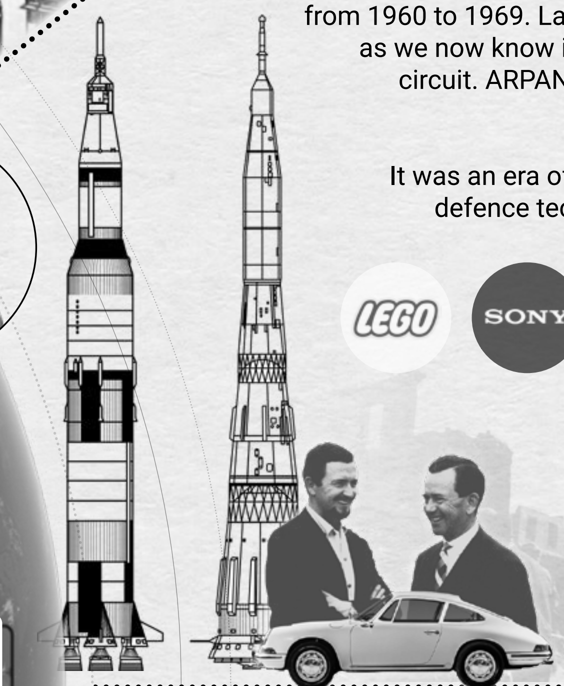
General Motors, Goodyear, Holiday Inn, Walmart, Mobil, Boeing, Proctor & Gamble were all companies that were founded in a post-war era. However, 9 out of every 10 Fortune 500 companies that were founded in 1955 are now gone, merged or contracted today. Innovation at this time included the credit card, commercial computer, artificial satellite, and modern solar cell.

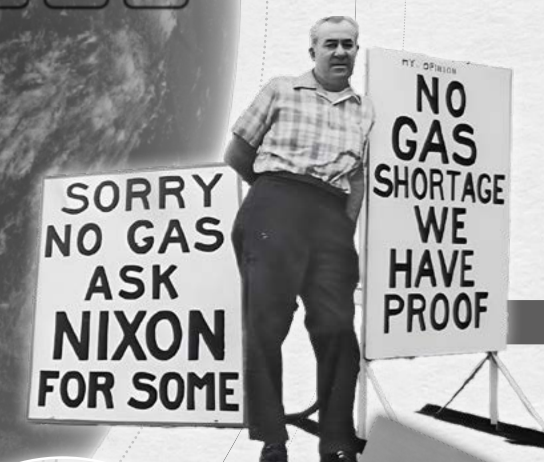
1960's: The space race and technological progress.

Investment theme: "Nifty Fifty".

Much of the technology that we enjoy today was developed in the fast-moving decade from 1960 to 1969. Lasers, L.E.D.s, push button phones, space travel, the computer as we now know it – including the mouse, and most importantly the integrated circuit. ARPANET – the precursor to the internet was also developed during this period.

It was an era of the space race and investments flooded into aerospace and defence technologies as the Cold War between the Soviet Union and the USA and its allies was underway.





1970's: Energy crisis and technological progress.

Investment theme: Emerging markets / commodities.

Many remember the 1970s as a decade of soaring inflation, political upheaval, and the erosion of United States' prestige worldwide. But the significance of the seventies goes beyond high gas prices, Watergate, and Vietnam - profound changes to politics, societal norms, and the nation's economy took root.

The 70s began the age of the practical computer made possible by the invention of the floppy disk (IBM). The mobile phone (Motorola), Sony Walk-man, the first digital camera (Kodak), Post-It-Notes, and the microprocessor all occurred during the 70s.

1980's: The digital revolution and economic expansion.

Investment theme: Japanese stocks.

Led by Ronald Reagan, the era of "Reaganomics" witnessed economic growth in the US driven by deregulation and tax cuts, marked by leveraged buyouts, corporate restructuring, and private equity investments. Concurrently, the Japanese asset bubble saw speculative investments in Japanese markets, while tech giants like Sony and Panasonic introduced ground breaking innovations like the camcorder and CD player, with Nintendo pioneering the console-based gaming industry. Despite the meteoric rise of these companies during the period, notable market downturns such as Black Monday in 1987 saw significant setbacks, yet stalwarts like Microsoft and Apple, born amidst this economic landscape, have endured as contemporary champions.

DAY 1

Time	Subject	Speaker/s
08:45	**Welcome and opening remarks.**	**Alishia Seckam** Master of Ceremonies
09:00	**Is South Africa past the worst, and can things get meaningfully better from here?** Lady R was a clear low point for South Africa. Subsequent to that, things have started improving, but can South Africa make real progress towards unlocking meaningful growth in 2024 and beyond?	**Rudi Dicks** Office of the Presidency **James Holley** Traxtion Moderator: **Kevin Lings** STANLIB
09:40	SA Multi-Asset Panel: **Managing a traditional 60/40 balanced portfolio in today's volatile environment.** • Does the 60/40 model still have relevance? • Should the "toolbox" or the "tools" change to reflect today's market environment? • Balancing the offshore Reg28 allocations. Implementation challenges? • Reviewing your tactical and strategic asset allocations for 2024.	**Charles de Kock** Coronation **Sandile Malinga** M&G Investments **Justin Floor** PSG Asset Management **Bastian Teichgreeber** Prescient Investment Management Moderator: **Victoria Reuvers** Morningstar Investment Management
10:20	**Navigating the intricacies of ESG.** • Why we can't divorce ESG from fundamentals. • Valuation-based versus values-based investing.	**Raine Adams** Allan Gray
10:50	**Comfort break.**	

Time	Pavilion	Bill Gallagher
11:10	SA Equity: **Running the stock pickers gauntlet in 2024.** • It is all about defensive stocks at the moment and "style" drift? • Finding value amidst a low growth scenario. • Which industries and sectors do you think will surprise us on the upside in 2024? **Wim Murray** - Foord, **Rob Spanjaard** - Rezco Asset Management, **Iain Power** - Truffle Asset Management Moderator: **Florbela Yates** - Equilibrium Investment Management	Fixed Income: **Inflation is a global problem and it is glaringly stubborn.** • Balancing a fixed income portfolio given the uncertain inflationary outlook. • Chasing yields and risks that keep us awake at night. • Hedging against our bets. **Albert Botha** - Ashburton Investments, **Ian Scott** - Momentum Investments, **Philip Bradford** - PortfolioMetrix, **Henk Kotze** - Prescient Investment Management Moderator: **Leigh Kohler** - INN8 Invest
11:55	**Disrupting the disrupters: The new intersection between Asset Management and Discretionary Fund Management.** • How did asset managers miss a trick and allow the DFM insurgency? • Why have more credible investment processes lost ground to "flimsier" propositions? • Increasing tension between what many advisers value in a DFM and what investors need. • Who will be the winners and the losers? **Brandon Zietsman** - PortfolioMetrix	**Balancing act: Beating inflation targets, while navigating interest rate cycles.** • The importance of examining both short and long-term global interest rate trends to position your clients' portfolios for successful outcomes. • Opportunities to exploit for both the short-term cautious investors, and for long-term investors. **Bastian Teichgreeber** and **Cheree Dyers** - Prescient Investment Management
12:25	**Lunch break.**	

Time	Pavilion	Bill Gallagher	Committee Room 4	Committee Room 5	Boardroom 2 & 3
13:25	**Implementing a global investment solution in your practice.** **Dimitri Theo** and **Marize van der Merwe** Cogence	**Blueprints for wealth: Integrating timeless investment truths into solutions architecture.** **Rafiq Taylor** Glacier Invest	**The case for equities: Should this asset class still be a major component of growth portfolios, or is there an argument for reducing it in favour of other more reliable sources of alpha?** **Florbela Yates** Equilibrium Investment Management	**Diamonding unpacked: Clients are evolving, retirement planning should evolve with it.** **Raziq Christians** PPS Investments	**The case for doing well and doing good in portfolio construction.** **Ann Leepile** Alexforbes
14:00	**Global investing: Where are the good opportunities? They might be in areas that you are not expecting.** **Greg Hopkins** PSG Asset Management	**The winds of change: Choosing when to sail or when to anchor.** **Bernard Wessels** and **Christo Lineveldt** - Coronation	**Navigating new horizons: Revolutionising portfolio construction.** **Kingsley Williams** Satrix	**SA Equities: Navigating the minefield.** **Wim Murray** Foord	**Investing in a post-COVID property paradigm.** **Evan Robins** Old Mutual Investment Group
14:35	**Minimising the risk of an unsustainable drawdown in retirement… and what to do where it cannot be avoided.** **Shaun Duddy** Allan Gray	**A cheat sheet to investing in 2024 and beyond.** **Iain Power** and **Raihan Allie** Truffle Asset Management	**Can AI make investing more personal?** **Ferdi van Heerden** and **Paul Nixon** Momentum Investments	**Living too long in your annuity: Exploring dynamic drawdown strategies.** **Kyle Hulett** Sygnia Group	**Sometimes risk is an opportunity to be taken.** **Rob Spanjaard** Rezco Asset Management
15:05	**Comfort break.**				

Time	Pavilion	Speaker/s
15:25	**Listed infrastructure: Addressing the challenges of our times.** • The global search for energy security and investment opportunities. • AI and the energy transition are benefiting global infrastructure investments. • The tailwind for infrastructure is here to stay. • SA investors are underweight in global and local infrastructure assets yet risk and return profiles can be improved by incorporating these assets.	**Alex Araujo** M&G Investments
15:55	**Cycle savvy: Navigating markets with a long-term lens.** • The importance of strategy, valuation, discipline and resilience in enduring market cycles.	**Nicholas Hops** Coronation
16:25	**Closing comments.**	**Alishia Seckam** Master of Ceremonies
16:35	**Industry networking.**	

Investment Forum 2024 | Frontiers of Disruption Johannesburg: 12 & 13 March 2024

DAY 2

Time	Subject	Speaker/s
08:45	**Welcome and opening remarks.**	**Brent Lindeque** Master of Ceremonies
09:00	**Pioneering the future of investments: Strategies for tech-forward portfolios.** Magda will be joined by 4 analyst's from Braavos Investment Advisers, largest shareholders in Oxford Science Enterprises, where they will be discussing the investment opportunities in innovative high growth sectors in a tech driven environment. This will include insights into AI, clean energy and climate challenges, the healthcare revolution, agritech and the challenges of feeding the world as well as the future of finance. • Insights on how to diversify investments across innovative high growth sectors. • Opportunities and risks for early adopters. • Understanding venture capital investments.	**Alexander Peile** Braavos Investment Advisers **Andre Crawford-Brunt** Braavos Investment Advisers **Arjun Dasannacharya** Braavos Investment Advisers **Jacob Goodwin** Braavos Investment Advisers Moderator: **Magda Wierzycka** Sygnia Group
09:40	**The wolf of Dorp Street (and other stories).** • Market participants should be mindful of investment pitfalls. • Generally accepted principles and methodologies are often flawed. • Assumptions are dangerous and should always be questioned.	**Deon Gouws** Credo

Time	Pavilion	Bill Gallagher
10:15	**The sleeping dragon - Ignore it at your peril.** • Unlocking the power of Emerging Markets - seizing opportunities in the world's second largest economy. • A fresh perspective on the current state of the Chinese economy and the opportunities and challenges that investors face. • Why China remains a fantastic opportunity for South African investors, and why an allocation to China should be a cornerstone of a successful investment strategy. **Liang Du** - Prescient China	**The AI revolution in finance.** • What are we talking about when we talk about AI in finance (ML, NLP, and GenAI)? • What are some practical applications for AI that's possible today? • For beginners, how does one begin implementing an AI program? **Jan de Koning** - Robeco
10:50	**Key themes impacting global equity investing.** • The effect of recent macroeconomic and geopolitical events on markets. • Do investment styles matter when investing globally during uncertainty? • How to reap returns in volatile global markets using a systematic investment process. **Amadeo Alentorn** - Old Mutual Global Equity Fund	**The diary of an unconventional 24-year portfolio management career.** • How multi-asset investing has evolved. • Where new opportunities can be found. • How currency hedging can add value in offshore portfolios, why macro matters. • Considerations for building stronger portfolios for your clients. **Marius Oberholzer** and **Tarryn Sankar** - STANLIB
11:20	**Comfort break.**	

Time	Pavilion	Bill Gallagher	Committee Room 4	Committee Room 5
11:50	**The mega forces & themes driving the future of investing and portfolio construction.** **Omar Moufti** BlackRock	**The dirty little secret of the green transition.** **Charl de Villiers** Ashburton Investments	**Global equity income: Doing well and doing good.** **Neil Denman** Sarasin & Partners LLP	**The end of "Free Money" and how to navigate the new regime.** **Anton Eser** 10X Investments
12:25	**How to ***** up an investment portfolio.** **Philip Bradford** PortfolioMetrix	**Emotional money: Dealing with the irrationality of investments.** **AJ Snyman** Peregrine Capital	**GLP-1's: the potential portfolio disruptor.** **Jarrod Cahn** Credo	**Navigating the interest rate storm: Delivering client excellence amid financial turbulence.** **James Turp** Sanlam Investments

Time	Pavilion	Bill Gallagher
13:00	Global Equity: **Valuations ALWAYS matter.** • The AI frenzy and how to overcome benchmark performance in a global equity portfolio when returns are within a narrow sector. • Investment mistakes to avoid right now. • Geographies, sectors and companies we are favouring in 2024. **Laura Cooper** - BlackRock, **Amadeo Alentorn** - Old Mutual Global Equity Fund, **Dan Brocklebank** - Orbis, **Neil Denman** - Sarasin & Partners LLP Moderator: **Wade Witbooi** - Glacier Invest	Alternative Assets: **The great retreat from public equity into alternative investing. Is this really the case?** • If so, what is driving this shift? • How retail investors can access these asset classes. • How to use alternative investments in modern day portfolio construction. **Lebo Thubisi** - Alexforbes, **Roland Rousseau** - NeoBeta, **Dino Zuccollo** - Westbrooke Alternative Asset Management Moderator: **Eugene Visagie** - Optimum Investment Group

Time	Pavilion	Speaker/s
13:45	**The good future: Doing well and doing good!** • The current state of the world seems like an antidote to the very idea of 'The Good Future'. • We are truly at a fork in the road in human history (climate change, AI, geopolitics and more). • Things may get worse before they get better, but we are actually making exponential leaps in scientific and technological innovation that will allow us to create a good future. • The future is better than we think!	**Gerd Leonhard** Futurist and Humanist
14:15	**Closing comments.**	**Brent Lindeque** Master of Ceremonies
14:25	**End of The Investment Forum 2024.**	

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Frontiers of DISRUPTION doing well and doing good

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