

AGENDA

KangaNews-NAB Fixed Income Beyond the Institutional Sector Summit 2018

2 August The Hilton Sydney

>>> REGISTER

8.15am **REGISTRATION OPENS**

9.00am **WELCOME**

Drew Bradford

Executive General Manager, Markets
National Australia Bank

9.10am **KEYNOTE PRESENTATION**

Brain power

Presenter

Todd Sampson

Documentary maker, television presenter
and businessman

10.20am **MORNING BREAK**

10.50am **PANEL DISCUSSION**

If you want my money the pitch had better be good: alternative and new-entrant debt issuers make their case

Panellists

Garry Edwards

Managing Director

AAM Investment Group

Miles George

Chairman

Bright Acre Energy

David Hancock

Executive Director and Group Head

Afterpay Touch Group

Moderator

Cathryn Carver

Executive General Manager, Client Coverage

National Australia Bank

11.30am **PANEL DISCUSSION**

Justify yourself: how fund managers add value

- What institutional managers do that individuals can't or don't.
- Institutional investment in the royal-commission era.
- Future frontiers in institutional investment.

Panellists

Chris Black

Managing Director

Alexander Funds Management

Richard Brandweiner

Chief Executive Officer, Australia

Pendal Group

Christopher Joye

Co-Chief Investment Officer, Fixed Income

Smarter Money Investments

Nicholas Yaxley

Director, Advisory and Asset Management

BondAdviser

Moderator

Mark Todd

Head of Core-Client Engagement

National Australia Bank

12.00pm **LUNCH BREAK**

1.00pm **PANEL DISCUSSION**

Under the hood as a bank investor

- Balance-sheet changes are structural – what does it mean for investors?
- Stress testing and mythbusting.
- What assets do banks want, and where will their growth come from?

Panellists

Shaun Dooley

Group Treasurer

National Australia Bank

John Pearce

Chief Investment Officer

Unisuper

Curt Zuber

Group Treasurer

Westpac Banking Corporation

Moderator

Mark Todd

Head of Core-Client Engagement

National Australia Bank

1.30pm **Impact of local and global politics on investors**

- Political direction and investment strategy in an unpredictable world.
- Public perception of financial services and 'doing the right thing'.
- Incorporating long-term sustainability.

Panellists

Mike Baird

Chief Customer Officer,

Corporate and Institutional Banking

National Australia Bank



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Damian Graham
Chief Investment Officer
First State Super

David Whiteley
Chief Executive Officer
Industry Super Australia

Moderator
Mark Todd
Head of Core-Client Engagement
National Australia Bank

2.00pm Q&A
Exploring corporate funding journeys – issuers share insights into what brings them to market and what they want from debt investors

Panellists
Chris Andrews
Chief Investment Officer
La Trobe Financial

Ashley Burtenshaw
Partner
Gryphon Capital Investments

Jason Huljich
Head of Real Estate and Funds Management
Centuria Capital

Moderator
Nathan Doake
Head of Capital Market Products
National Australia Bank

2.30pm AFTERNOON BREAK

3.00pm PANEL DISCUSSION
Banks step out, but who steps in?
• Superannuation and bank funds – how motivations differ.
• Where are the opportunities now and in future?
• Optimising the use of Australia's savings pool.

Panellists
Jonathan Armitage
Chief Investment Officer
MLC

Nick Bishop
Head of Australasian Fixed Income
Aberdeen Standard Investments

Steve Goldman
Managing Director
Kapstream Capital

Moderator
Christine Yates
Executive General Manager
NAB Private

3.30pm PANEL DISCUSSION
I'll show you my portfolio if you show me yours
• Fixed income and diversity of investment approach.
• Bottom up or top down in the fixed-income portfolio?
• What are the latest innovations in the sector?

Panellists
Dan East
Chief Investment Officer
Future Super

Graham Hay
Deputy Portfolio Manager
Antipodes Partners

Anne Moal
Senior High-Yield Analyst
Perpetual Investments

Matt Williams
Portfolio Manager
Airlie Funds Management

Moderator
Laurence Davison
Managing Editor
KangaNews

4.00pm CLOSING REMARKS

4.10pm SESSIONS CLOSE AND COCKTAIL FUNCTION