

AGENDA: 12 MAY 2025 | ONLINE ZOOM WEBINAR ONLY

Monday, 12 May 2025 – Online Zoom Webinar Only

Day 1	Theme	Presenting Company	Speakers	Topic
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 09:25	Global Equity Views & Opportunities <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	Contrarius Investment Management	Simon Raubenheimer	Contrarian Investing in a changing world
09:25 – 09:45	Global Equity Views & Opportunities <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	Fundsmith	Greville Ward	Do less, weigh less, drink less, spend more
09:45 – 10:25	Global Equity EM Views & opportunities. <i>Moderated by Tavonga Chivizhe, Apex Investment Consulting SA</i>	Riscura Solutions (UK) Sands Capital	Jarred Glansbeek Eric Black	The China market: how attractive is the opportunity? Decoupling & Diversification: The Case for Emerging Markets
10:25 – 10:45	Global Index <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	Ginsglobal Index Funds	Anthony Ginsberg	Global Index & Market Outlook
10:45 – 11:05	Global property views and positioning <i>Moderated by Eugene Braak, Apex Investment Consulting SA</i>	Reitway Global & Hoya Capital	Greg Rawlins & David Auerbach	The ascent of US REITs: The key allocation in Global Property Portfolios
11:05 – 11:20	TEA BREAK			
11:20 – 12:00	Global Equity Views & Opportunities <i>Moderated by Leigh Kohler, INN8 Invest</i>	Lindsell Train Martello Asset Management	Ben van Leeuwen Gary Hill	The right to win Does TINA still apply...?
12:00 – 12:40	Global Equity Views & Opportunities <i>Moderated by Michael Dodd, Morningstar</i>	GQG Partners/ Southern Right Capital Guinness Global Investors	Kevin Osten Dr Ian Mortimer	TBC Why Dividends Matter
12:40 - 13:20	Global Equity - Value <i>Moderated by Andreea Bunea, Old Mutual Multi Managers</i>	T. Rowe Price Artisan Partners	Oliver Alston Aaron Roberts	Global Value Equity An introduction to the Artisan Global Value fund
13:20 - 13:40	Global Fixed Income	Fairtree	Paul Crawford	Global Credit: This time it's going to be different (again)
13:40 – 13:45	DAY 1 – ONLINE ONLY CONFERENCE CLOSE			