

AGENDA: 13 MAY 2025

Tuesday, 13 May 2025 – In person (and live streamed) at The Maslow Hotel, Time Square, Menlyn Pretoria				
Day 2	Theme	Presenting Company	Speakers	Topic
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 10:15	Global Equity Views & Opportunities <i>Moderated by Sameer Singh, Glacier</i>	Mazi Asset Management	Andreas van der Horst	Wealth is created by investing in quality global companies
		Coronation Fund Managers	Neil Padoa	Navigating Concentrated Markets: Finding Stock Picking Opportunities Beyond the Obvious
		Ranmore Funds	Sean Peche	Opportunities in Global Equities
		BlueAlpha Investment Man.	Richard Pitt	Cheap is not value
10:15 – 11:10	Multi Asset Views & positioning <i>Moderated by Nadine van Taak, Analytics Consulting</i>	Fairtree	Chantelle Baptiste	Trump, Turmoil and Opportunity
		Sasfin Asset Managers	Arno Lawrenz	Navigating the End of the World: Investing through the Apocalypse
		Vunani Fund Managers	Rory Spangenberg	Active management in uncertain times – why the index is no longer your friend!
11:10 – 11:30	Global & Domestic property views and positioning	Sesfikile Capital	Evan Jankelowitz	From Struggle to Strength – The South African Real Estate Revival
11:30 – 12:15	TEA BREAK / LUNCH BREAK			
12:15 – 13:25	Fixed Income Views and Opportunities <i>Moderated by Jonel Matthee Ferreira, Cogence</i>	Cadiz Asset Management	Sidney McKinnon	Fixed Income Dynamics – A critical look
		Methodical Investment Management	JP du Plessis	Yield and future performance are not the same thing
		Visio Fund Management	Jonathan Myerson	Unlocking Income: A Proven Flexible Strategy for South African Fixed Income
		Oakhaven Capital	Bruce Thistlewhite	Income Funds – are they inflation proof?
13:25 – 14:20	SA Domestic Equity Views and opportunities <i>Moderated by Pierre de Klerk, Apex Investment Consulting SA</i>	All Weather Capital	Shane Watkins	How is it GNUing?
		Bateleur Capital	Warren Riley	Navigating Domestic Equities: Current Views and Future Prospects
		Northstar Asset Management	Marco Barbieri	SA Equity in 2025: Where Strategy Meets Opportunity
14:20 – 14:40	Global Equity	Credo	Jarrold Cahn	Global Equity Views and opportunities
14:40 – 15:00	Guest Speaker <i>Introduced by Eugene Braak</i>	Guest Speaker Credo	Deon Gouws	Did I Ever Tell You How Lucky You Are?
15:00 – 15:05	DAY 2 - CONFERENCE CLOSE			
15:05 – 18:00	NETWORKING DRINKS & SNACKS			