BCI GLOBAL INVESTMENT CONFERENCE

BCI Global Investment Conference 2025

AGENDA: 14 MAY 2025

Wednesday, 14 May 2025 – In person (and live streamed) at The Maslow Hotel, Time Square, Menlyn Pretoria				
Day 3	**Theme**	**Presenting Company**	**Speakers**	**Topic**
09:00 – 09:05	Welcome		Eugene Braak	
09:05 – 09:45	Multi Asset Views & positioning *Moderated by **Florbela Yates**, Equilibrium*	**Granate Asset Management** **Centaur Asset Management**	Catherine Blersch Nick de Vos	TBC Did SA miss the window?
09:45 – 10:55	Fixed Income Views and Opportunities *Moderated by **Pierre de Klerk**, Apex Investment Consulting SA*	**Argon Asset Management** **Portfolio Metrix** **Laurium Capital** **Aluwani Capital Partners**	Maitse Motsoane Philip Bradford Melanie Stockigt Conrad Wood	Evolving Global Macro Policy Conundrum How to generate consistent returns in an inconsistent world In a year of uncertainty, what are the 3 things we are certain about in the SA fixed income market? Fixed Income Outlook – opportunities & risks
10:55 – 11:25	**TEA BREAK**			
11:25 – 12:20	Global Equity Views & Opportunities *Moderated by **Roeloff Horne**, Miton Optimal*	**Balondolozi Investment Services** **Flagship Asset Management** **MIPlan / ThinkCell**	Fannuel Tigere Philip Short Tony Bell	In 2022, both global bonds and stocks declined. Could this happen again? Navigating Volatile Markets Understanding the rotation in equity markets & the impact of a potential dollar devaluation
12:20 – 13:00	Global Fixed Income and SA Credit *Moderated by **Trevor Garvin**, Nedgroup Investments*	**Ninety-One** **Saffron Wealth Fund Management**	Stephen Naidoo Brandon Quinn	The investment case for SA credit Opportunities in Global Fixed Income
13:00 – 14:10	Domestic Equity Views and opportunities *Moderated by **Eugene Braak**, Apex Investment Consulting SA*	**36ONE Asset Management** **Allan Gray** **Anchor Asset Management** **Investec Investment Management**	Cy Jacobs Siphesihle Zwane Peter Armitage Barry Shamley	Key Themes Influencing Our Decision Making The Looming Tails TBC Beyond blue chips
14:10 – 14:15	**DAY 3 - CONFERENCE CLOSE**			