



2024 INVESTOR CONFERENCE

19-21 MAY | MELBOURNE



2024 Program

VALUE INVESTOR WORKSHOP
INVESTOR INSIGHTS SOCIAL EVENING
INVESTOR CONFERENCE
SITE TOURS

VALUE INVESTOR WORKSHOP

Spend an evening in the life of an investment analyst, getting all of your questions answered.

Join Owen Rask, alongside ASA Chief Marketing & Education Manager Leigh Gant, for an enriching half-day intensive investor training, covering must-know topics inside and outside the spreadsheet.

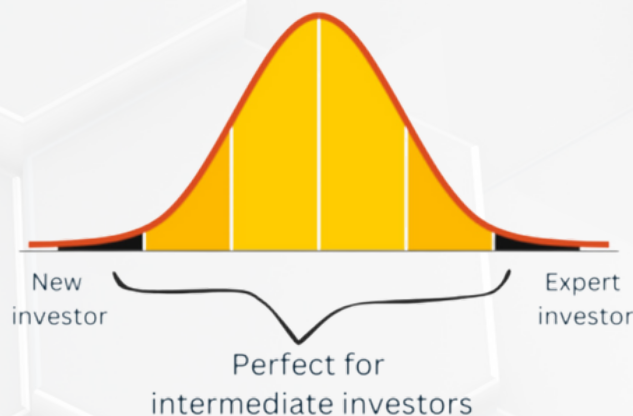
Network with peers and develop life-long bonds.

Covering everything you wish you knew about value investing (but no-one tells you). Real case studies.



TOPICS

1. Develop an investment process
2. Screening & filtering strategies
3. Connecting financial statements
4. Identify bad operators
5. Discounted cash flow, IRR & more
6. Competitor research
7. Develop an investment thesis
8. ASX case studies



DATE: Sunday, May 19th 2024
TIME: 2:00pm - 5:00pm
LOCATION: Rydges Melbourne

\$299

INCLUDED

- All excel models and notes
- Value Investor Program online course
- Tea, coffee and afternoon tea
- Networking

FEATURED SPEAKERS



Senator Andrew Bragg
Senator for New South
Wales at Commonwealth
of Australia



Debby Blakey
President, ACSI and
CEO, HESTA



Joe Aston
Former AFR Rear
Window Columnist



**Christine
McLoughlin AM**
Chair, Suncorp



Warren Hogan
Managing Director, EQ
Economics & Economic
Advisor



Patricia McKenzie
Chair, AGL



Bec Wilson
Author, columnist for
SMH/Age Money Section
and podcaster



Philip Chronican
Chair, NAB



Jacob Varghese
CEO, Maurice
Blackburn



Phil Slade
Founder, Decida



Mark Freeman
Managing Director
Australian Foundation
Investment Company



Don Hamson
Managing Director, Plato
Income Maximiser Limited



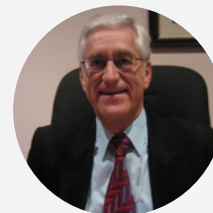
Ian Irvine
CEO, Listed Investment
Companies & Trusts
Association (LICAT)



Tracey Wahlberg
Investment Analyst,
Magellan



Travis Butcher
Fund Manager,
Charter Hall



Howard Coleman
Director, Teaminvest



Ron Shamgar
Head of Australian
Equities, TAMIM



Nick Healy
Portfolio Manager,
WAM Global



Lukasz de Pourbaix
Global Cross Asset
Specialist, Fidelity
International



Julian Campbell-Wood
Portfolio Manager,
Resolution Capital



Emma Davidson
CEO, Staude Capital
Global Value Fund



Miles Staude
CIO, Staude Capital
Global Value Fund



Andrew Lockhart
Managing Partner,
Metrics Credit Partners



Sam Kazacos
Investment
Specialist, Antipodes



Steven Mabb
Chair, ASA



Jamie Nemtsas
Director, Wattle
Partners



Drew Meredith
Director &
Advisor, Wattle
Partners



Owen Rask
Founder, Rask



Mike Robey
Victorian Company
Monitoring Committee
Co-Chair



Darin Tyson-Chan
Publisher, Editor
selfmanagesuper,
smstrustee news and
Financial Observer



2024 INVESTOR CONFERENCE

DAY 1 - Monday 20 May

9am to 5pm

MORNING SESSIONS

Keynote Speaker

Warren Hogan, Managing Director, EQ Economics & Economic Advisor, Judo Bank Australian Financial Review's (AFR) Top Cash Rate Forecaster and Top Economic Forecaster in 2023 (awarded 2024)

ASA Awards

Steven Mabb, Chair, ASA
Rachel Waterhouse, CEO, ASA

Governance Panel

Debby Blakey, President, ACSI and CEO, HESTA
Jacob Varghese, CEO, Maurice Blackburn
Mike Robey, Former ASA Board member and Chair of ASA's Policy Committee; Victorian Company Monitoring Committee Chair; and former Telstra Executive Director



MORNING TEA

Investing outside the norm

Julian Campbell-Wood, Portfolio Manager, Resolution Capital
Andrew Lockhart, Managing Partner, Metrics Credit Partners
Sam Kazacos, Investment Specialist, Antipodes



Big Superannuation Panel

Senator Andrew Bragg, Senator for New South Wales at Commonwealth of Australia
Moderator: Darin Tyson-Chan, Publisher, Editor selfmanagementsuper, smtrusteenews and Financial Observer



LUNCH

ASA CONVENOR AND MONITOR CATCH UP

BREAKOUT SESSIONS

The Global Consumer: Structural Growth Opportunities

Tracey Wahlberg, Investment Analyst, Magellan



Undiscovered global gems

Nick Healy, Portfolio Manager, Wilson Asset Management

Is it possible to outperform passive investing?

Emma Davidson, CEO, Staude Capital Global Value Fund
Miles Staude, CIO, Staude Capital Global Value Fund



Undiscovered global gems

Owen Rask, Founder, Rask

Why the closed-end structure of LICs and LITs is suited to long-term investing

Mark Freeman, Managing Director Australian Foundation Investment Company
Don Hamson, Managing Director, Plato Income Maximiser Limited
Moderator: Ian Irvine, CEO, Listed Investment Companies & Trusts Association (LICAT)



AFTERNOON TEA

Small Cap Panel

Join three CEOs of listed companies from the small end of town

Keynote Speaker

Special guest

ASA Individual Awards

Steven Mabb & Rachel Waterhouse



COCKTAIL HOUR



2024 INVESTOR CONFERENCE

DAY 2 - Tuesday 21 May

9am to 5pm

MORNING SESSIONS

Keynote Speaker

Special guest

Managing Your Retirement & Superannuation

Bec Wilson, Author, columnist for SMH/Age Money Section and podcaster

Jamie Nemtsas, Director, Wattle Partners

Drew Meredith, Director & Advisor, Wattle Partners



MORNING TEA

BREAKOUT SESSIONS

Why Social Infrastructure is an attractive Asset Class

Travis Butcher, Fund Manager, Charter Hall



Beyond global mega caps

Lukasz de Pourbaix, Fidelity International



Buffett and Munger Style Investing on the ASX

Howard Coleman, Teaminvest Private



LUNCH

BREAKOUT SESSIONS

AI and Growth Stocks: Navigating the Future of Investment

Guest Speaker

Small Cap Special Situations: Mergers and Takeovers

Ron Shamgar, Head of Australian Equities, TAMIM



AFTERNOON TEA

Chairs Panel

Phillip Chronican, Chair, NAB

Christine McLoughlin AM, Chair, Suncorp

Patricia McKenzie, Chair, AGL

Moderator: Joe Aston, Former AFR Rear Window Columnist



Living with Apes. The brain, the pain, and one thing that changes everything

Phil Slade, Founder, Decida



Conference Closing

Rachel Waterhouse, CEO, Australian Shareholders' Association



ASA AGM (Members Only)

5:15pm

SITE TOURS

SITE TOUR 1: GrainCorp

Wednesday 22 May 2024, 9.15am - 12.30pm

GrainCorp is an Australian agribusiness and processing company with over a century of experience in partnering with growers and producers. Their expertise lies in managing a diverse range of grains, pulses, and oilseeds, as well as producing edible oils, biofuel components, and animal feeds. With a commitment to innovation and leading technology, they continuously enhance supply chain efficiency while upholding superior Quality Assurance standards. From developing infant formula products to sourcing locally and globally, GrainCorp leverages its global network to address the world's food challenges.

9.15am: Arrive at GrainCorp

9.30am: Presentation - About GrainCorp, about West Footscray, Q&A

10.00am: Safety briefing and light refreshments

10.30am: Tour of facility

12.30pm: Departure

Dresscode:

- Long sleeves and long pants are required (corporate attire/dresses are not appropriate)
- No jewellery can be worn (only exception is plain wedding bands)
- Enclosed steel-cap boots must be worn. People with their own should bring them, however GrainCorp will provide some if required.
- Eyewear and hairnets are required in some parts of the facility (GrainCorp will provide these).

Cost: \$55.00 incl GST per person

**Please note this agenda is draft only and may be subject to change.*



SITE TOURS

SITE TOUR 2: ANZ CYBER SECURITY AND FRAUD INFORMATION SESSION

Wednesday 22 May 2024, 2.00pm - 3.30pm

2.00pm: Arrive at ANZ, tour of ANZ Security Operations Centre (SOC)

2.30pm: Presentation - Gajan Ananthapavan

3.00pm: Presentation - Shaq Johnson

3.30pm: Departure

Gajan Ananthapavan

- Gajan is the Head of Cyber Security at ANZ, reporting directly to the Chief Information Security Officer, Maria Milosavljevic. His responsibilities include preventing and overseeing security incidents, as well as liaising with Government and Law Enforcement to stay updated on threats and share information with relevant agencies. Gajan also oversees cyber risk controls within the organization.

Shaq Johnson

- As the Head of Customer Protection for ANZ Retail, Shaw brings over 8 years of experience with ANZ to his role. Previously serving as Head of Customer Protection Australia Retail for 5 years, and Head of Fraud Operations for 4 years, Shaw has also held senior roles in Fraud Investigation and Risk. In his current capacity, he oversees all aspects of external fraud management, including operations, analytics, reporting, investigations, and dispute resolution.

Cost: \$20.00 incl GST per person

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