



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.

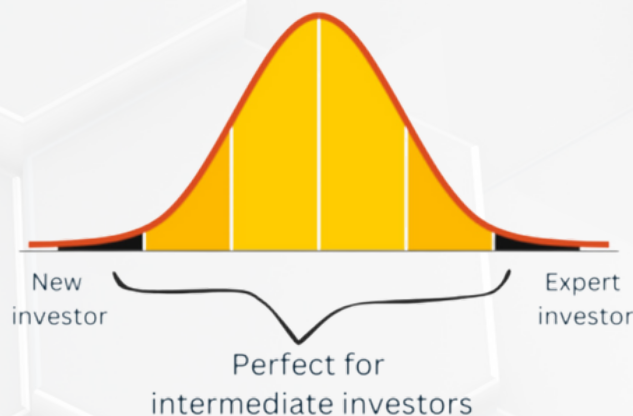
Network with peers and develop life-long bonds.

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



Richard White
CEO and Founder,
WiseTech Global



Dr Sam Hupert,
CEO, Pro Medicus



Philip Chronican
Chair, NAB



Patricia McKenzie
Chair, AGL



Jacob Varghese
CEO, Maurice
Blackburn



Phil Slade
Founder, Decida



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



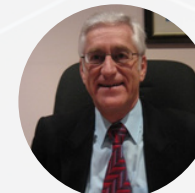
Ian Irvine
CEO, Listed Investment
Companies & Trusts
Association (LICAT)



Brendan Malone
Managing Director and
Group CEO Raiz Invest



Craig Keary
CEO, Selfwealth



Howard Coleman
Director, Teaminvest



Don Hamson
Managing Director, Plato
Income Maximiser Limited



Mark Freeman
Managing Director
Australian Foundation
Investment Company



Lukasz de Pourbaix
Global Cross Asset
Specialist, Fidelity
International



Julian Campbell-Wood
Portfolio Manager,
Resolution Capital



Emma Davidson
CEO, Staude Capital
Global Value Fund



Chris Andrews,
CEO, LaTrobe
Financial



Andrew Lockhart
Managing Partner,
Metrics Credit Partners



Sam Kazacos
Investment
Specialist, Antipodes



Ron Shamgar
Head of Australian
Equities, TAMIM



Jamie Nemtsas
Director, Wattle
Partners



Drew Meredith
Director &
Advisor, Wattle
Partners



Owen Rask
Founder, Rask



Mike Robey
Victorian Company
Monitoring Committee
Co-Chair



Travis Butcher
Fund Manager, Charter Hall



Nick Healy
Portfolio Manager,
WAM Global



Darin Tyson-Chan
Editor, smstrusteenews



Tom Wickenden,
Investment Strategist,
Betashares



Miles Staude
CIO, Staude Capital
Global Value Fund



Tracey Wahlberg
Investment Analyst,
Magellan



Steven Mabb
Chair, ASA



2024 INVESTOR CONFERENCE

DAY 1 - Monday 20 May

MORNING SESSIONS

9.10 AM Revolutionising healthcare: a vision for the future with AI

Dr Sam Hupert, Chief Executive Officer, Managing Director and Executive Director, Pro Medicus
Join Dr. Sam Hupert, CEO of Pro Medicus, for a visionary keynote exploring the transformative role of AI in healthcare. Discover the latest in medical imaging innovation and the future possibilities for enhancing diagnostic precision and patient care. Gain insights into how AI-driven technologies are redefining healthcare, opening new avenues for investors, and improving outcomes globally.



9.40 AM ASA Company 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



10.30 AM - MORNING TEA

11.00 AM Investing outside the norm

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



A panel discussion with three experienced investment professionals who are looking outside the usual investment landscape to highlight the potential of other opportunities for investing. Join Metrics' Managing Partner, Andrew Lockhart (Australian Private Debt), Portfolio Manager at Resolution Capital, Julian Campbell-Wood (Global REITs) and Investment Specialist at Antipodes, Sam Kazacos (Global Equities) to hear their insights.

11.45 AM Big Superannuation Panel

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



12.30 PM - LUNCH

ASA CONVENOR AND MONITOR CATCH UP

BREAKOUT SESSIONS

1.35 PM The Global Consumer: Structural Growth Opportunities

Tracey Wahlberg, Investment Analyst, Magellan



This presentation focuses on structural growth opportunities that will impact returns for the global consumer sector over the next 3-5 years. In the near-term, consumer companies are (still) contending with pandemic-driven demand distortions, disinflation, interest rates, and rapid changes in consumer behaviour. More broadly, the disruptions of the past few years have driven fundamental changes in the competitive landscape and to the sources of competitive advantage that are critical for global companies. Competitive barriers have risen owing to rising rates. Artificial intelligence is aiding trends in beauty personalisation as well as frictionless commerce. One thing is clear – the next 10 years will not look like the last. Investors that can adapt to the new reality with thoughtful bottom-up research will be rewarded.

Undiscovered global gems

Nick Healy, Portfolio Manager, Wilson Asset Management

2.10 PM Is it possible to outperform passive investing?

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



Emma and Miles will debate the pros and cons of passive investing. Emma will argue the pro case, showing how difficult it is to outperform markets through active management. Miles will then argue the case for active fund management. As a married couple who run their own company together, this should set the scene for an entertaining and informative session!

Behaving yourself: The easiest way to get \$100,000 income from stocks

Owen Rask, Founder, Rask



2024 INVESTOR CONFERENCE

DAY 1 - Monday 20 May

BREAKOUT SESSIONS

2.45 PM 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)

Listed Investment Companies (LICs) and Listed Investment Trusts (LITs), like many other investment products offer investors:

- Ease of access – traded on ASX
- Pooled investing – one trade provides exposure to a range of underlying investments
- Diversification – across a range asset classes, investment managers and styles

The closed-end structure of an LIC or LIT also brings other benefits when investing for the long-term, be it for growth, income or both. These can include:

- Active management, where considered investments strategies are not wedded to tracking an index avoiding;
 - Forced buying in overheated markets or
 - Selling value into falling markets
- Delivering a consistent income stream over time, with
 - LITs paying monthly income directly to investors
 - LICs having the ability to retain profit and stream income over time
 - including franking on assets classes such as, global shares, small companies and alternative assets

This interactive panel discussion looks at why the closed-end structure of LICs and LITs is well suited to a range of investors with a long-term investment view, be they seeking to accumulate a diversified portfolio of assets or derive a stable income stream when in retirement.

3.20 PM - AFTERNOON TEA

AFTERNOON SESSIONS

3.50 PM Navigating the AI evolution: insights and the future

Richard White, Executive Director and CEO



Explore the future of artificial intelligence with insights from a renowned futurist and business leaders from top companies, including Wisetech and NextDC. This session delves into AI's current applications and its transformative potential, discussing its implications for business and society. Discover how AI innovation is shaping industries and uncover investment opportunities in a rapidly evolving landscape.

4.35 PM Unlocking Value: A Deep Dive with Small Cap Innovators

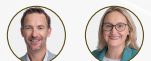
Craig Kearny, CEO of Selfwealth
Moderator: Steven Mabb, Chair, ASA



Experience an exclusive panel discussion moderated by ASA Chair, Steven Mabb, featuring Craig Kearny, CEO of Selfwealth, alongside 1-2 other distinguished CEOs of leading small cap companies. Each speaker will present an insightful 10-minute overview of their company, showcasing their strategies, achievements, and future outlook. Following the presentations, embrace the unique opportunity to engage directly with these industry leaders through an interactive Q&A session. This is your chance to delve into the dynamics of small cap investing, understand company visions firsthand, and ask the questions that matter to you as an investor.

5.20 PM ASA Individual Awards

Steven Mabb & Rachel Waterhouse



5.30 PM - COCKTAIL HOUR



2024 INVESTOR CONFERENCE

DAY 2 - Tuesday 21 May

MORNING SESSIONS

9.05 AM **Will Australia remain on the RBA's 'Narrow Path'? Australia's economic outlook for 2024/25 in a global and political context**

Warren Hogan, Managing Director, EQ Economics & Economic Advisor



Key Points:

- So far so good. The economy remains on track to return inflation to target while avoiding a serious economic recession – but it is no sure thing as domestic and international risks abound.
- Economic recovery in the major economies and geopolitical tensions impacting investment and trade might complicate the RBA's efforts.
- Does the Government's pre-election Budget and industrial relations policy mean it's higher for longer for interest rates?
- Australian business has navigated the economic slowdown well, but margin pressures and soft consumer spending could undermine this strong performance in the coming financial year.

9.35 AM **Benefit of ASA and overview of funds management**

Chris Andrews, CEO, LaTrobe Financial



10.10 AM **Good retirement, bad retirement, best retirement**

Jamie Nemtsas, Director, Wattle Partners

Drew Meredith, Director & Advisor, Wattle Partners

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



10.45 AM - MORNING TEA

BREAKOUT SESSIONS

11.15 AM **Why Social Infrastructure is an attractive Asset Class**

Travis Butcher, Fund Manager, Charter Hall



Brendan Malone, Managing Director and Group CEO Raiz Invest

TBC

Investment in the social infrastructure property sector provides stable and economically resilient long-term returns. Social Infrastructure properties are buildings / accommodation that deliver essential community services. There is a broad array of community services that may be delivered through a range of social infrastructure property, with typical examples including, childcare, education, health, transport and government services.

11.50 AM **Beyond global mega caps**

Lukasz de Pourbaix, Fidelity International



Buffett and Munger Style Investing on the ASX

Howard Coleman, Teaminvest Private

12.25 PM - LUNCH

SHARESIGHT WORKSHOP



2024 INVESTOR CONFERENCE

DAY 2 - Tuesday 21 May

BREAKOUT SESSIONS

1.25 PM

Active vs passive: It's more than just the funds you choose



Tom Wickenden, Investment Strategist, Betashares

The success of passive investment strategies compared to active ones has been well documented. But beyond choosing low-cost, passive strategies, what steps can investors take to avoid becoming their own worst enemy?

Topics to cover:

- SPIVA data
- Why passive beats active – management fees, the structure of performance fees, portfolio turnover, market exposure, etc.
- What you can learn from expert asset allocators: how do financial institutions, super funds, and other asset allocation professionals approach portfolio construction? And how can investors apply this to their own portfolios? (Discuss with DB, Louis, Cham, et al to get an understanding of how Betashares IC does this, and what we could share with the audience in an approachable manner)
- Adding some 'spice' in a controlled manner (i.e. core/satellite, including ASX 300 shares)

2.00 PM

Small Cap Special Situations: Mergers and Takeovers

Ron Shamgar, Head of Australian Equities, TAMIM



3.00 PM - AFTERNOON TEA

3.20 PM

Chairs Panel

Phillip Chronican, Chair, NAB

Christine McLoughlin AM, Chair, Suncorp

Patricia McKenzie, Chair, AGL

Moderator: Joe Aston, Former AFR Rear Window Columnist



4.55 PM

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

Phil Slade, Founder, Decida



5.25 PM

Conference Closing

Rachel Waterhouse, CEO, Australian Shareholders' Association



5.30 PM

ASA AGM (Members Only)

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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