2024 INVESTOR CONFERENCE

19-21 MAY | MELBOURNE

asa Australian Shareholders' Association

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.

$299

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, 19 May
TIME: 2.00 PM - 5.00 PM
LOCATION: Rydges Melbourne

SOCIAL INSIGHTS EVENING

The ASA's Investor Insights Evening marks the commencement of our premier Conference, setting the stage for two days of strategic learning and networking. As the prelude to our Conference, we invite attendees to an accessible, relaxed setting that's ripe for networking, learning, and genuine enjoyment.

EVAN LUCAS
LEADING ECONOMIST AND MEDIA PERSONALITY

OWEN RASK
FOUNDER, RASK

JESSICA AMIR
MARKET ANALYST, MOOMOO

HENRY JENNINGS
MARKET STRATEGIST AND ANALYST, MARCUS TODAY

DAVID TUCKWELL
SENIOR PRODUCT & INVESTMENT STRATEGIST, GLOBAL X ETFS AUSTRALIA

$49.95

SESSIONS

All the dumb stuff I've done with money - Owen Rask

Mind Over Money - Evan Lucas

Buy, Hold, Sell - Jessica Amir & Henry Jennings

DATE: Sunday, 19 May
TIME: 5.30 PM - 8.00 PM
LOCATION: Rydges Melbourne

FEATURED SPEAKERS

Phil Muscatello
MC, podcast host and ASA member

Joe Aston
Former AFR Rear Window Columnist

Christine McLoughlin AM
Chair, Suncorp

Philip Chronican
Chair, NAB

Patricia McKenzie
Chair, AGL

Richard White
CEO and Founder, WiseTech Global

David Dzienciol
Chief Customer and Commercial Officer, NEXTDC

Debby Blakey
President, ACSI and CEO, HESTA

Warren Hogan
Managing Director, EQ Economics & Economic Advisor

Dr Sam Hupert,
CEO, Pro Medicus

Jacob Varghese
CEO, Maurice Blackburn

Mary Delahunty
CEO, ASFA

Phil Slade
Founder, Decida

Brendan Boyd
CEO and Managing Director, Silk Logistics

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

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

Owen Rask
Founder, Rask

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

Brendan Malone
Managing Director and Group CEO Raiz Invest

Craig Keary
CEO, Selfwealth

Julieanne Mills
Director, Australian Shareholders' Association

Ian Curry
Director, Australian Shareholders' Association

Chris Andrews,
CEO, LaTrobe Financial

Emma Davidson
CEO, Staude Capital Global Value Fund

Doug Morris
CEO, Sharesight

Mark Freeman
Managing Director Australian Foundation Investment Company

Mike Robey
Victorian Company Monitoring Committee Co-Chair

Howard Coleman
Director, Teaminvest

Kathleen Yeung
Global Head of Corporate Development

Andrew Lockhart
Managing Partner, Metrics Credit Partners

Sam Kazacos
Investment Specialist, Antipodes

Don Hamson
Managing Director, Plato Income Maximiser Limited

Miles Staude
CIO, Staude Capital Global Value Fund

Jamie Nemtsas
Director, Wattle Partners

Drew Meredith
Director & Advisor, Wattle Partners

Cameron Gleeson
Senior Investment Strategist

Darin Tyson-Chan
Editor, smstrusteenews

Travis Butcher
Fund Manager, Charter Hall

Tracey Wahlberg
Investment Analyst, Magellan

Nick Healy
Portfolio Manager, WAM Global

Lukasz de Pourbaix
Global Cross Asset Specialist, Fidelity International

Julian Campbell-Wood
Portfolio Manager, Resolution Capital

Elfreda Jonker
Portfolio Manager, Alphinity

Rachel Waterhouse
CEO, Australian Shareholders' Association

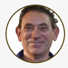
Steven Mabb
Chair, Australian Shareholders' Association

2024 INVESTOR CONFERENCE

DAY 1 - Monday 20 May

MORNING SESSIONS

9.00 AM **ASA Investor Conference 2024 Welcome**



Phil Muscatello, MC, podcast host and ASA member

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

9.45 AM **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
Mary Delahunty, CEO, ASFA
Moderator: **Darin Tyson-Chan**, Publisher, Editor selfmanagedsuper, smstrusteenews and Financial Observer

12.30 PM - LUNCH **ASA CONVENOR AND MONITOR CATCH UP**

BREAKOUT SESSIONS

1.30 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.

The evolution of global AI investing in 2024

Elfreda Jonker, Portfolio Manager, Alphinity

Excitement around the life-changing potential of Generative AI dominated headlines and equity market returns in 2023. What is next for this megatrend in 2024 and beyond? In this webinar, Alphinity global, will discuss their balanced approach to investing in early AI beneficiaries and across the broader AI ecosystem and why they continue to look further afield to companies not just creating AI, but using it.

Topics to cover:
- Are the early AI beneficiaries still good investments following their stratospheric performance since the start of 2023?
- Who are the other key players in the AI ecosystem beyond the Magnificent 7, and do they still stand to benefit from insatiable AI demand?
- Where do you see the next AI infused opportunities beyond tech?
- What are the future opportunities and risks associated with AI?

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

Right in front of you, Owen Rask, Chief Investment Officer at The Rask Group, will create a retirement portfolio capable of yielding 5%, using nothing but a brokerage account - and without picking stocks. He identifies the exact investments he is buying today, including simple long-term options with franking credits. And let's not forget growth! He'll cover that too.

Australian Shareholders' Association

DAY 1 - Monday 20 May

BREAKOUT SESSIONS

2.50 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
Kathleen Yeung, Global Head of Corporate Development
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.

Building and Tracking a Global Multi-Asset Class Portfolio

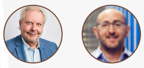
Doug Morris, CEO, Sharesight

Diversifying across multiple asset classes is not just a strategy but a necessity for the savvy investor. In this session, Doug Morris, delves into all things asset allocation from a multi asset class perspective with the aim of demonstrating how you can keep track of your own personal asset allocation strategy.

3.25 PM - AFTERNOON TEA

AFTERNOON SESSIONS

3.55 PM **Navigating the AI evolution: insights and the future**



Richard White, CEO and Founder, WiseTech Global
David Dzienciol, Chief Customer/Commercial Officer, NEXTDC

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.

4.40 PM **Unlocking Value: A Deep Dive with Small Cap Innovators**

Craig Keary, CEO of Selfwealth
Brendan Boyd, CEO and Managing Director, Silk Logistics
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.

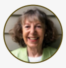
5.25 PM **ASA Individual Awards**

Steven Mabb & Rachel Waterhouse

5.35 PM - COCKTAIL HOUR

DAY 2 - Tuesday 21 May

MORNING SESSIONS



8.55 AM ## ASA Investor Conference 2024 Welcome

Christine Haydon, Victorian State Chair

9.00 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 ## Future of Investments

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

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.

Raiz Your Game: Improving Financial Literacy and Building Wealth for all Australians

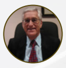
Brendan Malone, Managing Director and Group CEO Raiz Invest

Financial literacy and building wealth are more important than ever. See how Raiz Invest is making a difference and break the generational cycles and impacting all Australians by making it easy to understand investing and breaking down the barriers to market entry. Brendan will provide insights and trends learned over the past few years and investing behaviour and actions of Australians over this time.

11.55 AM ## Beyond global mega caps

Lukasz de Pourbaix, Global Cross Asset Specialist, Fidelity International

Many Australian investors have a strong preference for domestic stocks over global stocks. This is particularly the case for small and mid-cap (SMID) companies as the scale of the global opportunity set is simply too large for most investors to contemplate. However, it's the size and diversity that makes SMID equity investing at the global level so attractive. Find out from Fidelity how they view the SMID universe, and the role research plays in finding companies in their earlier stages of growth.



Are you averaging 15-20% returns on your ASX investments with low risk?

Howard Coleman, Director, Teaminvest Private

In this session Howard will pose the question "What strategies can ASA members use to achieve returns averaging 15-20% per year with a high level of safety over the long-term?"

Howard will show how a well-constructed low risk ASX portfolio can indeed deliver returns of 15-20% on average over the long-term, with the right tools and investing approach.

12.30 PM - LUNCH **SHARESIGHT WORKSHOP**

Join Sharesight CMO Prashant Mohan as he demonstrates how Sharesight can help you become a smarter investor. In this exclusive session, you'll see first-hand how you track all your investments in one place using Sharesight -- everything from shares, managed funds, ETFs, LICs, and managed funds, to foreign currencies (including cryptocurrencies).

Plus Sharesight lets you:
- Automatically track dividends including DRPs (and franking credits)
- Easily identify winners and losers with powerful performance reports
- Compare your performance against the market with benchmarking
- Simplify tax-time with detailed tax reporting and secure portfolio sharing
- There will be plenty of time to ask questions and find out if Sharesight is right for you

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DAY 2 - Tuesday 21 May

BREAKOUT SESSIONS

1.30 PM

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

Cameron Gleeson, Senior 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?

Undiscovered global gems

Nick Healy, Portfolio Manager, Wilson Asset Management

Join WAM Global Portfolio Manager Nick Healy as discusses the dynamic landscape of global equity markets, highlighting the investment opportunities within artificial intelligence. Nick will explore the WAM Global investment process and the four key themes his team monitors: digital enterprise, electronic marketplaces, innovative health, and critical assets.

3.00 PM - AFTERNOON TEA

3.30 PM

Chairs Panel

Phillip Chronican, Chair, NAB
Christine McLoughlin AM, Chair, Suncorp
Patricia McKenzie, Chair, AGL
Moderator: **Joe Aston**, Former AFR Rear Window Columnist

4.15 PM

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

Phil Slade, Founder, Decida

Behavioural economics and the psychology of risk decision making is often talked about, but doesn't always seem very practical. In this session we explore the brain, common decision making bias's, and one thing we can do to immediately improve our decision making.

4.55 PM

Monitoring session

5.20 PM

Conference Closing

Rachel Waterhouse, CEO, Australian Shareholders' Assoication

5.30 PM

ASA AGM (Members Only)

Australian Shareholders' Association

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