CENTREPOINT ALLIANCE

Virtual Investment Roadshow

Day 1: Wednesday, 4 October 2023

Time	Description
10 mins before	**Arrival, technology check and welcome to Day 1** *Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar.* *Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.*
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am AEDT 12:00pm	***Where are we now, where we might be going and how best to get there?*** Australian Retirement Trust – Brian Parker Following the GFC, investors enjoyed a decade of terrific investment returns. The post GFC world was one of low inflation and interest rates and abundant liquidity – a rising tide that lifted all boats. The next decade is likely to look considerably different. The COVID pandemic and its aftermath have delivered, in less than three years, a deep recession, an inflationary surge, an aggressive hike in interest rates and now a geopolitical environment that is arguably more perilous than at any time since the end of the Cold War. In this presentation we discuss how the world might evolve from here and how portfolios might be constructed – using both traditional and alternative asset classes - in order to mitigate the risks and capture the opportunities that will inevitably arise. **Estimated CPD areas:** General **Registration link:** **https://attendee.gotowebinar.com/register/4260030747640710752**
30 mins	**Break**
Session 2 AWST 10:15am ACST 11:45pm AEST 12:15pm AEDT 1:15pm	***Climate transition risk is factored into sovereign bond markets. So why aren't governments talking about it?*** Ardea – Dr Laura Ryan [brought to you by Fidante] Investors have a right to information about their investments, and how that money is being used or is at risk, especially regarding climate change. In this session, we will cover the following topics; – Need a well-functioning government bond market for everything (fiscal policy, central bank policy, mortgage rates, bank stability, save haven asset allocation, retirement savings… the list goes on) – Show case how our modelling shows climate Change Transition Risk is being priced into government bond yields now but… – Climate risk is underestimated today, thus risk premium greater in the future resulting in higher yields and more volatility – Why is this important for gov bond fund managers, asset owners, retirees? **Estimated CPD areas:** General **Registration link:** **https://attendee.gotowebinar.com/register/2991637432373833817**
30 mins	**Break**

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Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm AEDT 2:30pm	***What will drive Australian and Global equity portfolios in 2024,*** Antipodes (Global Equities), Firetrail (Australian Equities), Resolution Capital (Global REITs) [brought to you by Pinnacle Financial] Hear three 15-minute fireside presentations covering each boutique's views on the main drivers that are likely to influence the performance of their portfolios in the year ahead. The presentations will cover both macro and the key bottom-up investment fundamentals, along with their best investment ideas. **Estimated CPD areas:** General **Registration link:** https://attendee.gotowebinar.com/register/4179926927511896663
30 mins	**Break**
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm AEDT 3:45pm	***Trust in a Digital Age,*** HUB24 The digitisation of our world has implications on trust and who consumers put trust in. As trust of institutions has profoundly changed, people's notions of trust have moved away from a centralised to a more decentralised view—from "Who do we trust?" to "What do we trust?" **Estimated CPD areas:** General, Client Care and Practice **Registration link:** https://attendee.gotowebinar.com/register/8044413431005095770
AWST 1:30pm ACST 3:00pm AEST 3:30pm AEDT 4:30pm	**Close**

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Day 2: Thursday, 5 October 2023

Time	Description
10 mins before	**Arrival, technology check and welcome to Day 2** *Each webinar has its own attendance link which you will receive in the calendar invite upon registration for a webinar.* *Full attendance and quiz/polling question completion is required for each webinar attended to receive CPD.*
Session 1 AWST 9:00am ACST 10:30am AEST 11:00am AEDT 12:00pm	***Built to last: Assessing opportunities and constructing portfolios in an unpredictable environment,*** Morningstar – Matt Wacher Investment markets continue to remind investors that anything can happen. For portfolios to succeed in the long term, they need to be resilient to withstand multiple environments and events. This unpredictability makes, required a robust approach to building portfolios that have a variety of risk and return drivers. These drivers can come from both asset allocation and manager selection but require expert portfolio construction techniques to ensure long term investment outcomes are achieved. **Estimated CPD areas:** General **Registration link: https://attendee.gotowebinar.com/register/7518688543254001503**
30 mins	**Break**
Session 2 AWST 10:15am ACST 11:45pm AEST 12:15pm AEDT 1:15pm	***Volatility and Recessions – look back to learn how to look forward,*** Macquarie – Gary Ding Volatility and recessions can pose significant challenges to investor portfolios. This session will outline key challenges posed by volatility in relation to asset allocation, as well as some of the approaches to mitigate these challenges. Likewise, this session will summarise the current expected point in the cycle, based on key economic metrics, and what this will likely mean for multi-asset portfolios. Via an analysis of past recessionary and volatile periods what can investors learn and subsequently apply to portfolios as we look forward? **Estimated CPD areas:** General **Registration link: https://attendee.gotowebinar.com/register/992808855961687131**
30 mins	**Break**
Session 3 AWST 11:30am ACST 1:00pm AEST 1:30pm AEDT 2:30pm	***Effective Client Communication: Are Concerns about Inflation Inflated?*** Dimensional – Alex Lennon and Eleanor Kirkpatrick How should investors think about the potential impact of inflation? What do markets reaching new highs suggest for the months ahead? Dimensional Investment Strategist, Alex Lennon, provides historical context of inflation data alongside recent research for investors looking to outpace inflation over the long-term. Dimensional Regional Director, Eleanor Kirkpatrick, complements the data with a tried and tested communication framework. Advisers will leave armed with a toolkit of Scripts, Stories, Sketches and Supplements to support difficult client conversations around the impact of inflation. **Estimated CPD areas:** General **Registration link: https://attendee.gotowebinar.com/register/3108578190570143071**
30 mins	**Break**

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Time	Description
Session 4 AWST 12:45pm ACST 2:15pm AEST 2:45pm AEDT 3:45pm	***A portfolio construction toolkit for the next decade,*** Schroder Investment Management – Sebastian Mullins and Sophie Metcalfe Portfolio construction is more complex than it has been in years. Markets continue to oscillate as economic data neither confirms nor denies the bull or bear case. So how can advisers plan to construct their portfolios in this environment? It is going to be extremely important to take heed of how the landscape may change and start to plan accordingly. Sebastian Mullins, Head of Multi Asset, and Sophie Metcalfe from the financial advice account management team, will provide an interactive session aiming to give you useful tools and resources to help you with your portfolio construction. They will take the short-term themes of the next economy and put it into practical portfolio construction tips for the longer-term. **Estimated CPD areas:** General **Registration link:** https://attendee.gotowebinar.com/register/924109170435040342
AWST 1:30pm ACST 3:00pm AEST 3:30pm AEDT 4:30pm	**Close**