



14 September 2017 | The Empire Venue

PROGRAMME

- 07h30** **Registration & networking**
- 08h45** **Welcome**
Gugulethu Cele – Master of Ceremonies
Rob Rose – Editor, Financial Mail & **Tim Cohen** – Editor, Business Day
Henry van Deventer – Wealth Strategist, Old Mutual Wealth
- 08h57** **The South African & geopolitical investment landscape**
With the recent downgrades to junk status, plunging business and consumer confidence and the country spiralling into a technical recession, South Africa faces challenging times. However there are still some positives - the Rand seems to have held its ground, finally we are seeing respite from the drought and trade surplus levels continue to improve. Is it a case of doom and gloom or will we, in true South African spirit, bounce back? Most importantly, what does this mean for the South African investor?
Kevin Lings – Chief Economist, STANLIB
- 09h30** **Investing in scary times**
Nuclear war in North Korea, Donald Trump in the White House, Brexit and bear markets make for a scary global environment. While locally a recession, an upcoming elective conference and the threat of ratings downgrades create an unsettling domestic environment. How will this impact markets and how do you manage your financial future
Peter Brooke – Head of MacroSolutions, Old Mutual Investment Group
- 09h53** **How technology & innovation changes the rules of investing**
From the growth of cryptocurrencies such as Bitcoin to robo-advising and algorithmic trading, technological advancements continue to disrupt the investment universe. Private investors now have a huge array of market intelligence previously only available to professional fund managers. Professional investors in turn are now able to extrapolate big data, with some fascinating results. How much of a trading role is the human playing, or should we make way for the algorithmic trader?
Shaun Nicholson – Head: SA Financial Markets, IRESS
Charles Savage – Founder of EasyEquities & Group CEO, Purple Group
Farzam Ehsani – Blockchain Lead, Rand Merchant Bank
MODERATOR: Andile Khumalo
- 10h35** **Tea break**
- 11h08** **In conversation with...**
A one-on-one interview with Sygnia Group's, Chief Executive Officer Magda Wierzycka, revealing valuable learnings from her journey in the finance world.
Magda Wierzycka – CEO, Sygnia Group
HOST: Alishia Seckam
- 11h41** **The power of passive**
Is passive investing or indexation a panacea to curing all investment ills? A passive strategy, however conservative it may be, greatly reduces the probability of underperformance. Active management on the other hand, offering much higher potential rewards, only pays off for top performing fund managers. And there are the management costs to consider. What strategy should the astute South African investor adopt?

12h04

Offshore investing – Best practices

With mounting political and economic risk, an increasing number of South African investors are choosing to take their money offshore, with mixed results. Is a local rand hedge investment or foreign currency investment best for your needs?

Trevor Garvin – Head: Multi-Management, Nedgroup Investments

Nesan Nair – Senior Portfolio Manager, Sasfin Wealth

John Kennedy – Director & Regional Head: Cape Town, Citadel Wealth Management

Magnus Heystek – Director, Brenthurst Wealth Management

MODERATOR: Gugu Cele

12h45

Lunch & networking

13h48

The hidden risk of investing in bonds

Bonds are classically considered to be lower risk investments, and relative to equities they are. But by investing in bonds, individuals and pension funds are exposed to credit and other risks. This session will highlight these risks and provide insights as to what you can do to recognise and mitigate them.

Olga Constantatos – Credit & Equity Process Manager, Futuregrowth

14h11

Investing for life stages – the strategy for you - right now

Major life events such as getting married or becoming a parent have profound effects on our financial goals. A young, single person for example may be tempted to consider a high-risk / high (potential) return investment strategy, while a parent saving for their child's education will usually follow a much more conservative strategy. Because our financial needs change as we go through these different life stages, determining the right investment strategy for you should be an ongoing process.

Bruce Fleming, CFP® – FPI Financial Planner of the Year 2016

Fatima Vawda – Founder & Managing Director, 27four Investment Managers

Cy Jacobs – Co-founder, 36ONE Asset Management

Craig Gradidge, CFP® - Executive Director: Investment & Retirement Planning Specialist, Gradidge Mahura Investments

Ntai Phoofolo, CFP® – Chairperson, Financial Planning Institute of Southern Africa (FPI)

MODERATOR: JJ Tabane

14h53

Investing for retirement

Many respected retirement experts use the benchmark of saving enough to live on 70% of your income during retirement, but with increasing life expectancies and rising medical costs, is this really realistically achievable? With the introduction of some very innovative products in the market, at lower costs, we are now starting to see a drastic change in the way South Africans are saving for their retirement. Setting yourself up for a comfortable retirement starts and ends with having a great plan.

Steven Nathan – Founder & Chief Executive, 10X Investments

15h18

Closing by MC