

momentum wealth
investment **summit** 2011
agenda and speaker profile
21 october 2011



the **global crisis** of **confidence**

market madness: what's happening and what's next?

event details

Every year, Momentum Wealth hosts an Investment Summit where we bring together leading commentators from across the industry to provoke debate on a wide range of industry matters. The Investment Summit is attended by many of SA's leading financial advisory practices, members of the press, asset managers and regulatory bodies.

Again this year, we have managed to secure a formidable list of speakers from various corners of the world where we trust that they will provide new insights and perspectives into the "Global Crisis of Confidence". In addition to a great line-up of local speakers, we have managed to attract international speakers like John Mauldin – renowned US market commentator and author, Sebastian Dovey from the Scorpio Partnership – possibly one of the world's foremost strategists in wealth management, Holly Mackay – an authority of Platform evolution and Geraint Anderson – the investment bank analyst (City Boy) who blew the whistle on the unsavoury practices of analysts, stock brokers and hedge fund managers during the credit crisis.

The Investment Summit will commence on Thursday, 20 October with an informal welcome cocktail party at Salt Restaurant at the Ambassador Hotel in Bantry Bay, to which we invite you and your partner/spouse. This is followed by a full day conference on Friday, 21 October at The Westin Cape Town. The conference is for delegates only. The day concludes with a cocktail party at The Westin Cape Town, to which we invite you and your partner/spouse.

agenda

Time	Subject Matter	Speaker
08h15-09h00	Welcome and opening remarks	Kevin Hinton - Head of Investment Marketing, Momentum Wealth
09h00-10h00	The Global Financial Crisis 4 years on - The state of financial markets throughout the world - Catalysts that will stabilise markets and restore investor confidence - What should investors be doing now?	John Mauldin – Renowned financial expert, a New York Times best-selling author and pioneering online commentator
10h00-10h45	South Africa Inc - SA valuations vs the rest of the world and discounting sovereign risks - Identifying pockets of investment opportunity in the local market	Karl Leinberger – CIO, Coronation Asset Management
10h45-11h15	Comfort break	
11h15- 12h00	Key insights into the global world of Wealth managers throughout the financial crisis - Asset allocations - Distribution trends - Fees and charges	Sebastian Dovey – Managing Partner, the Scorpio Partnership
12h00-12h45	The only glister is gold? - Factors driving the gold price boom - Haven of last recourse?	Johann Steyn – Director, Citigroup Global Markets
12h45-13h30	Lunch break	
13h30-14h15	The thirst for yield: Opportunities abound? - Preference shares, government bonds and corporate debt investment opportunities in SA - Yields and opportunities in international markets - The forecasted yield curve	Arno Lawrenz – CIO, Atlantic Asset Management
14h15-15h00	Opportunities in property investing - The supply/demand curve - Accessing property investment opportunities for yield and capital growth	Simon Pearce – CEO, Marriott
15h00-15h30	Comfort break	
15h30-16h15	Investment platforms are the new growth sector - Key drivers in the growth of platforms internationally - IFA responses to platform developments in the UK - Trends in overall pricing strategies and the UK Governments response thereto	Holly Mackay – CEO, The PlatForum
16h15-17h00	Insights during the build-up to the current financial crisis The “City’s” whistleblower reveals the unsavoury behaviour of analysts, stock brokers and hedge fund managers during the build-up to the current financial crisis	Geraint Anderson – Author of “Cityboy”
17h00-17h15	Conference wrap-up	
17h15 onwards	Drinks and cocktails for delegates and their partners/spouses	

speaker profiles



John Mauldin – Renowned financial expert, a New York Times best- selling author and pioneering online commentator

John Mauldin is a renowned financial expert, a multiple New York Times best-selling author, and a pioneering online commentator. His weekly e-newsletter, Thoughts From The Frontline, was one of the first publications to provide investors with free, unbiased information and guidance. Today, it is one of the most widely distributed investment newsletters in the world, translated into Chinese, Spanish and Italian. He is regularly seen on TV and in national print media. President of Millennium Wave Investments, he is the father of seven children (five adopted) and lives in Dallas, Texas.



Karl Leinberger – CIO, Coronation Asset Management

Karl is Chief Investment Officer and a member of the Executive Committee (Exco). He joined Coronation in 2000 as an equity analyst, was made head of research in January 2005 and appointed CIO in May 2008. Karl currently co-manages the Coronation Houseview portfolios.



Sebastian Dovey – Managing Partner, the Scorpio Partnership

As managing partner of Scorpio Partnership, Sebastian manages the development and execution of strategic recommendations. Sebastian has completed assignments around the globe for private banks, global banks, asset managers, family offices, technology firms, service providers, aggregators and start-up wealth management initiatives. He is also currently involved in creating and building education-based solutions for a number of clients. He is a regular commentator on the wealth management industry in the press and at conferences and academies. He has chaired and presented leading industry events in Asia, Europe and the United States. Sebastian has also been a lecturer at The Swiss Finance Institute (formerly the Swiss Banking School) for its executive MBA programme. He serves on the editorial board of WealthBriefing and is chairman of the advisory board of B-Hive, a network for global private client investors. Sebastian holds a first class BA (Hons.) degree in Modern History from University College London and was awarded an MSc (Econ.) with distinction from the London School of Economics.



Johann Steyn – Director, Citigroup Global Markets

Johann is a Director at Citigroup where he leads the global precious metals research. He became the top rated gold and precious metals analyst within one year of joining the investment industry and has held that position ever since. Prior to Citigroup, Johann worked at Deutsche Bank and McKinsey & Company. At McKinsey, Johann served mining companies around the world on topics ranging from corporate and commodity strategies to operational and organisational redesign. He holds a PhD in Metallurgical and Chemical Engineering.

speaker profiles



Arno Lawrenz - CIO, Atlantic

Arno is the Chief Investment Officer at Atlantic, where he heads up the investment team, with overall responsibility for investment performance. In addition he manages the long-only mandated fund in the flexible income space. He has 20 years experience in financial markets of which 15 have involved managing money and portfolios across a broad array of fixed income portfolios. He has won Raging Bull and Micropal awards for different fund mandates over the years. Arno also worked for Southern Asset Management (now Futuregrowth), Sanlam, Coronation and Old Mutual – the last 2 as Head of Fixed Income. Four years ago, he started Atlantic Asset Management as a stand-alone fixed-income asset manager, which now manages R3.5bn in various product mandates.



Simon Pearce - Chief Executive Officer of Marriott

Simon holds a BCom, MBA and Doctorate in Business Administration. He has 18 years investment experience with Marriott and was instrumental in bringing commercial and industrial property to the private investor.



Holly Mackay - CEO, The PlatForum

Holly is the Managing Director of The Platform which she founded in 2007. The Platform provides consultancy, research and events to the financial services sector and concentrates on platforms and retail distribution. A self-confessed platform bore, Holly has been working with fund distribution platforms for over 11 years and her experience spans the Australian, UK and continental European markets. Holly started her career in the Australian financial services industry where she developed and ran investment platforms at Merrill Lynch Investment Managers and Norwich Union. On returning to the UK in 2003, she worked for Abbey and was appointed the UK Director for Santander's Allfunds Bank in 2005, prior to setting up The Platform. Holly read French and Spanish at New College, Oxford University and holds a graduate Diploma in Applied Finance and Investments from the Securities Institute of Australia.



Geraint Anderson - Author of "Cityboy"

After finishing his degree at Cambridge Geraint spent his early twenties travelling around Asia and studying revolutions. In 1996 he began his career as an equity analyst covering the European utilities sector at an investment bank. Over the next decade he became one of highest ranked analysts in the Square Mile and by 2006 was heading up the fourth highest ranked team in the City. In September 2006 he began writing an anonymous weekly column called 'Cityboy' in the *London Paper* which exposed the hitherto secretive world of banking. It soon garnered a cult following. Geraint left the City in early 2008 and then published a memoir called 'Cityboy' that became a top 3 best-seller. He is now a regular media commentator on finance and the City.