

INVESTMENT SUMMIT

DISRUPTION, technological change and the internet of things HOW TO PROFIT FROM THE CHANGING EMPHASIS

DATE - FRIDAY 23RD MARCH 2018

TIME - 8.30am to 4.30pm

VENUE - SMC Conference & Function Centre, 66 Goulburn St, Sydney

COST - Members & partners: \$139.00, Includes lunch and refreshments

Non-members: \$274.00 Includes 1-year AIA membership,
lunch and refreshments

SPEAKER PAPERS
AVAILABLE BY
DOWNLOAD
PRIOR TO EVENT

OVERVIEW

The starting point will be knowing where your exposures are in your portfolio. The majority of investors have core exposures to banking (ANZ, CBA, NAB & WBC), retail (Wesfarmers and Woolworths), telecommunications (Telstra and TPG) and the energy sectors (Woodside, Santos, AGL and Origin). For many this exposure will make up the majority of your portfolio.

Our 2018 National Summit will be an eye opener on which risks investors need to manage from maintaining old allocations to the pillars of our economy. Who are the disruptors, what are the opportunities and how do investors readjust their portfolios?



Alex Pollak, Founder- Loftus Peak
Alex is CEO, CIO and founder of Loftus Peak. With 25 years experience in disruptive business models gained during a career with Macquarie Bank, Alex heads one of the best-performing teams in disruptive investment in Australia. He was instrumental in bringing both Seek and Carsales.com.au to the Australian stock market. His deep knowledge of investment and global change companies means you are ideally placed to benefit financially from the movements in technology which are daily changing the face of markets.



Jason Yetton, CEO - Society One
Jason has more than two decades' experience in financial services having worked in senior leadership roles in banking, funds management and wealth management. Prior to joining SocietyOne in March 2016, Jason was Group Executive of Westpac Retail and Business Banking for Australia which in 2015 was the largest division of the Westpac Group, responsible for 36% of Group Cash Earnings, 6.5 million customers, 10,000 employees and more than 900 branches. Under his leadership, the division won numerous industry awards for customer service and digital innovation.



Nick Griffin, Chief Investment Officer – Munro Partners
Nick is a founding Partner and the Chief Investment Officer of Munro Partners. Nick is responsible for the investment management of Munro's key investment funds and the formulation and implementation of the proprietary investment process. Nick has been managing Global Long / Short equity mandates out of Melbourne and Edinburgh for over 10 years. Nick holds a Bachelor of Commerce (Hons) degree from the University of Melbourne, a Graduate Diploma in Applied Finance and Investment and a Registered Representative of the Sydney Futures Exchange



James Dougherty, Founder – Lennox Partners
James is a founding Principal of Lennox Capital Partners and a Portfolio Manager of the Lennox Small Companies Fund. Prior to establishing Lennox Capital Partners, James was the lead portfolio manager of the Macquarie Small Companies Fund, which he ran since 2011. Prior to joining Macquarie, James worked at Morgan Stanley Australia and HSBC Investment Management, London. James has a Bachelor of Commerce from the University of Adelaide and a Graduate Diploma in Applied Finance and Investment from Finsia.



Charlie Aitken, Chief Investment Officer – AIM
Charlie is founder and fund manager of Aitken Investment Management. He is the former Managing Director of Bell Potter Wholesale and the author of the daily equity market newsletter Ringing the Bell. Charlie started his financial markets career in 1993 on the floor of the Sydney Futures Exchange dealing SPI futures for clients of Ord Minnett/Jardine Fleming. Over his 18 years working in financial markets, Charlie has experienced both bull and bear markets, including the Asian crash, the tech bubble and bust, 9/11, the resources boom, and the global financial crisis. He has met with hundreds of companies and investors all around the world. He has worked in both large and small firms, but has always been focused on the core business of finding undervalued stocks and investing with conviction.

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2018

THE PROGRAM

8.30 - 8.55 am	Registration
8.55 - 9.00 am	Opening <i>Russell Lees – AIA Director</i>
9.00 - 9.45 am	Digital disruption and the internet of things <i>Alex Pollak, Founder - Loftus Peak</i> There are a number of powerful reasons investors should pay close attention to the disruptors – one being that they are eating our core companies for lunch. Amazon only offers a picture of a product but is destroying our bricks and mortar stores. Newspapers' rivers of gold have been stolen by Google and Facebook. Banks are up against Google & Apple Pay and Peer to Peer Lenders. Its only a matter of time they are up against disruptors within their core mortgage business.
9.45 - 10.30 am	Taking on the big boys – disruption in the banking sector <i>Jason Yetton, CEO - Society One</i> Financial services is the new domain for disruptors. Mobile technology, networked consumers, cloud data and faster micro-chips have smashed the barriers of entry to the Fintech space. Society One is leading the way in Australia for taking market share in personal lending, traditionally the domain of the banks. Jason will run through their story, the growth opportunities and how investors can use peer to peer lending services to tap into new investment markets.
10.30 - 10.50 am	Morning Tea
10.50 - 11.35 am	Disruption is the main game globally, if you don't play it, you won't survive <i>Nick Griffin, Chief Investment Officer – Munro Partners</i> The investment needed to compete against nimble and aggressive disruptors is driving a massive drive in global efficiency and has years to play out. Nick will outline the global trends at play and how to capture this for your portfolio.
11.35 - 12.30 pm	Q&A Session We welcome Alex, Jason & Nick back on stage to take questions from the floor. We'll have two roving microphones.
12.30 - 13.30 pm	Lunch
13.30 - 14.15 pm	Australia is not the US; investing in disruption in Australia <i>James Dougherty, Founder – Lennox Partners</i> Whilst Facebook has a market cap of US\$530B, Google is US\$728B, in Australia we need to move down to the mid cap space to invest in similar type tech companies. James will provide his thoughts on how to achieve this, where Australia is on a global basis, and which disruptors will win.
14.15 - 15.00 pm	Positioning your portfolio for a disruptive economy <i>Charlie Aitken, Chief Investment Officer – AIM</i> As one of Australia's highest profile stock pickers, Charlie will take us through his views on this long term structural changes and what this means for your portfolio. Charlie will outline his stock tips.
15.00 - 15.20 pm	Afternoon Tea
15.20 - 16.20 pm	Q&A Session We welcome Charlie Aitken and James Dougherty back on stage to take questions from the floor. We'll have two roving microphones.
16.20 - 16.30 pm	Wrap Up
16.30 pm	<i>Russell Lees, AIA Director</i> Close



THE VENUE

The venue for the Summit is the Banquet Hall at the SMC Conference & Function Centre at 66 Goulburn St Sydney. The SMC building entrance is located at 66 Goulburn Street, near the corner of Castlereagh Street.

GETTING THERE:

BY TRAIN: Museum station is the closest train station. Take the Castlereagh St. exit from Museum station, then turn left heading south down Castlereagh St. At the first intersection (Castlereagh & Goulburn St.) turn right heading west down Goulburn St. 20 metres to the entrance of SMC Conference & Function Centre.

Alternately, a short walk south down Pitt Street from Town Hall Station, then left on Goulburn St.

BY CAR:

PARKING: Car parking is available nearby:

- City of Sydney Secure Parking's Goulburn Street Parking Station
 - Cnr Goulburn & Elizabeth Streets, Sydney NSW 2000 Phone 02 9211 0013
- Entry via Goulburn Street. Cost \$17 per day – entry 6.00am-9.30am; exit 3.00pm-7.00pm
(Rooftop parking - Go to rooftop, have the ticket validated in the morning and park on the roof)
Or, have your ticket validated at the venue for a similar discount.

THE COST

Members & partners: \$139.00 Includes lunch and refreshments

Non-members: \$274.00 Includes 1-year AIA membership, lunch and refreshments

Speak papers provided by download prior to the event.

REGISTRATION

Note that registrations will close at noon, Monday 19th March as the venue requires firm numbers for catering

TO REGISTER - Three Options:-

1. Phone the office on 1300 555 061,
2. AIA members register online
3. Complete the form below

REGISTRATION FORM & TAX INVOICE

Australian Investors Association ABN 75 052 411 999.

You may wish to keep a copy of this tax invoice for your records, as receipts will not be issued.

2018 AIA INVESTMENT SUMMIT - FRIDAY 23RD MARCH 2018

Date: _____

Title: _____ Name: _____ Surname: _____

Partner: _____

Address: _____

Suburb: _____ State: _____ P/Code: _____

Telephone: Primary _____ Mobile _____ Email _____

Are you a member of the AIA? NO YES Member number: _____

How did you hear about this event? _____

Please book _____ places for the Sydney Friday 23rd March 2018 seminar (Price includes GST)

Members & Partners _____ @ \$139 = \$

Non-members _____ @ \$274 = \$ (includes 1 year AIA membership) Total enclosed: \$ _____

Method of payment Cheque Master Card Visa Card

Number _____ / _____ / _____ / _____ Expiry date _____

Name on Card _____ Signature _____

Direct Credit - AIA Members Only - Bank: Bendigo Bank BSB: 633 000 A/C No: 120 632 385 Reference: Surname and Member Number