

# Navigating the Changing Environment

**Emma Kirk**

**Investing in small cap stocks**

**Adrian Ezquerro**

## Information Meeting

### Brisbane Group

**Wednesday 3<sup>rd</sup> April 2019 @ 12.30**

**Wesley House**

**140 Ann St**

**Brisbane**

**12.00 Registration**

**12.30 Navigating the changing environment**

*Emma Kirk*

Emma will deliver an in-depth presentation examining the current state of the global equities landscape, and highlight key areas of focus for investors to be aware of in order to preserve their capital long term.

**Emma Kirk – Key Account Manager, Magellan’s Listed Funds**

Prior to Magellan, Emma worked in wealth management at ANZ, focusing on advice remediation and governance programs. Emma was also a member of the leadership team at Asgard Wealth Solutions and BT Financial Group where she was responsible for licensee growth initiatives and diversifying revenue streams. She commenced her career in financial services in 1995 and has held business development and advice specialist roles at AMP Financial Services.



Emma holds a Bachelor of Business (Banking and Finance) from the QUT, a Diploma of Financial Services from Deakin University and a Green Belt certification in Lean Six Sigma from the Australian Graduate School of Management.

**Refreshments break: Available from adjacent coffee shop**

**1.45 Investing in small cap stocks**

*Adrian Ezquerro*

With the large cap sector of our stock market increasingly concentrated in the telcos, banks & resources sectors, many investors find ideal stocks to invest in within the small cap sector.

Given the challenges of the year ahead, this session will cover an overview of how small cap stocks are positioned in the current market environment and which stocks look attractive.

**Adrian Ezquerro - Portfolio Manager – Smaller Companies at Clime.**

Adrian joined Clime Investment Management in April 2007 and is responsible for identifying and evaluating investment opportunities across a broad range of sectors. In addition, Adrian has primary responsibility for the management of Clime’s Small Cap Sub-Portfolios and the Clime Smaller Companies Fund.



Prior to joining Clime, Adrian held various positions in the Fast Moving Consumer Goods (FMCG), sporting and real estate industries.

Adrian holds a Bachelor of Science from the University of Wollongong, a Graduate Diploma of Applied Finance from Kaplan Professional and a Graduate Certificate of Sports Management from the University of Canberra.

**Cost:** Members & Members’ Guests \$10pp / Non-Members \$15pp.

Australian Investors Association (ABN 75 052 411 999)

PO Box 1208, Oxenford QLD 4210

Tel: 1300 555 061 Fax: 07 5580 5587

Email: [aia@investors.asn.au](mailto:aia@investors.asn.au) Website: [www.investors.asn.au](http://www.investors.asn.au)

We would like to encourage members to bring along their membership card to meetings. We will have plastic holders to enable the card to be used as a name badge. This will also ensure members are given the preferential lower members rate. Don't forget member's partners and guests are welcome to come along at member's rates.

Hope to see you there.

Rod Fraser E: [rod\\_fraser@optusnet.com.au](mailto:rod_fraser@optusnet.com.au)

# 2019 AIA NATIONAL CONFERENCE INVESTMENT CONFERENCE OF THE YEAR

28-31  
JULY 2019



**BOOM  
BOOM  
BOOM.....??  
INVESTING BEYOND  
THE BOOM**

WHAT DOES AN ECONOMY WITHOUT A MAJOR  
STIMULUS BOOM MEAN FOR  
INVESTORS AND WHAT WILL BE THE GROWTH  
DRIVERS OF OUR ECONOMY GOING FORWARD?

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PO Box 1208, Oxenford QLD 4210  
Tel: 1300 555 061 Fax: 07 5580 5587  
Email: [aia@investors.asn.au](mailto:aia@investors.asn.au) Website: [www.investors.asn.au](http://www.investors.asn.au)