



Personal  
Finance  
Society

Standards. Professionalism. Trust.

## Agenda

### London Specialist Regional Roadshow | Accumulation & Investment | 2023

#### Venue:

The Insurance Hall, 20-21 Aldermanbury, London , EC2V 7HY

#### Date:

Thursday 19 Oct 2023



London Specialist Regional Roadshow | Accumulation & Investment |

In association with our Partners in Professionalism:

2023



19-Oct-2023

08:45 - 09:30 **Registration**

09:30 - 09:35 **Chair Introduction**

09:35 - 09:50 **Word Cloud Activity**

1. Discuss topical issues with professional peers
2. Learn from hearing and sharing experiences with the wider group

09:50 - 10:25 **The role of alternative assets in diversifying portfolios**

**Learning objectives:**

**By the end of this session, you will be able to:**

- Understand the important roles diversification can play in clients' portfolios
  - Identify the attractive characteristics of certain alternative asset classes
  - Recognise how alternative assets can add value for different investment priorities
- Henny Dovland, TIME Investments

## 10:25 - 11:00 From the shadows to the spotlight: the decade for Emerging Markets is here

### Learning Outcomes

- Role of active fund management and why M&G believe passive shouldn't be the default in Emerging Markets
- Demographic miracles: what to look for and what not to look for
- Corporate behaviour: making sure you are investing with dependable, return

George Rolls,

## 11:00 - 11:20 Conversations Over Coffee

## 11:20 - 11:55 ChatGPT and CGT: Two existential threats to Advisers

### Learning objectives

From this presentation attendees will

- Gain a better understanding of the use of algorithms in investment processes and the wider investment world.
- Appreciate the advantages of Unitised portfolios versus non-unitised portfolios
- Be able to explain why multi-manager funds will continue to play a role in client's portfolios

George Fox,

## 11:55 - 12:30 **Balancing the Blend**

By the end of this session, attendees will be able to:

- Distinguish between name diversification and true fundamental diversification
- Articulate the benefits of blending funds with different styles, including in decumulation
- Explain the benefits of regular rebalancing

James Amy, Orbis

## 12:30 - 13:10 **Lunch and Learn**

## 13:10 - 13:25 **Word Cloud Activity**

## 13:25 - 14:00 **Incremental gains not stamp collecting – Fixed Income investing in 2023 and beyond**

Learning objectives:

- Describe the key basic terms referred to in Fixed Income investment.
- Explain how fixed income can be actively managed to enhance returns and manage risk.

- Summarise the key challenges and opportunities within the current fixed income market.

Lloyd Harris,

## 14:00 - 14:35     **Managing low-cost portfolios in new regime**

Learning Objectives:

- Understand the current market conditions and assess the opportunities that it presents
- What's shaping the new market regime, the impact of high rates and changing correlations
- Considerations for portfolio construction and methods of managing the volatility

Chris Ellis Thomas, Blackrock

## 14:35 - 14:40     **Chairs Close**



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The content in each session has been carefully selected and can be considered for both structured and unstructured CPD hours, depending how this activity addressed each individual's personal development needs.

**Structured CPD** is the undertaking of any formal learning activity designed to meet a specific learning outcome (this is what an individual is expected to know, understand or do as a result of his or her learning).

**Unstructured CPD** is any activity an individual considers has met a learning outcome, but which may not have been specifically designed to meet their development needs.

Attendance at this event can be included as part of your CPD requirements should you consider it relevant to your professional development needs.

