AT A TURNING POINT

Conference on 13 and 14 April 2016,
Gottlieb Duttweiler Institute, Rüschlikon/Zurich
FUND EXPERTS FORUM 2016 – AT A TURNING POINT

The world’s financial markets are facing crucial times ahead: the streamlining of monetary policies in the US combined with continued quantitative easing in Europe and Japan and the cooling-off of a number of emerging markets will shape the situation and introduce new uncertainties into an already challenging market, suggesting that looking for profits will continue to be a big challenge.

The increasing digitisation of society has had many implications including forcing banks to fundamentally change their traditional business models. On the one hand this means new growth potential for Swiss banks, but at the same time it brings increased competition from new players in the market. The financial world finds itself at a turning point characterised by numerous uncertainties and unique opportunities.

You are cordially invited to attend the «At a Turning Point» Fund Experts Forum 2016 organised by «Finanz und Wirtschaft», Fundinfo and 15 internationally renowned asset management institutions. Use this opportunity to discuss future investment scenarios and benefit from valuable guidance to inform your investment decisions and ensure you don’t miss any opportunities.

I warmly welcome you to this event.

Clifford Padevit
Deputy Editor-in-chief Finanz und Wirtschaft

KEY TOPICS

» The Big Picture: What factors currently dictate the markets? What are the chances? What are the risks?

» Equal playing field: With complete tax transparency in place do Swiss banks gain uninhibited market access to the EU?

» Digitising in Banking: How will new and old players meet at the financial centre? Will there be cooperation or confrontation?

THE TARGET GROUP

The Fund Experts Forum is aimed at leaders in the private wealth sector (banks, family offices, independent portfolio managers) as well as representatives from institutional investment companies (insurance providers, public pension schemes, foundations) from Switzerland and Liechtenstein.

Please see the short videos of previous events from the Fund Experts Forum.

Simultaneous interpreting will be provided throughout (German/English).
Liquid alternatives

GFS: Unconstrained return generation + consistent low volatility = Absolute returns from a multi strategy concept

Emerging market equities with focus on China

Convertible bond allocations in a low-yielding investment world

Unlocking Asia’s dividend potential

European equities in a world of no return

Fixed income markets are at a crossroad, which way should investors turn? Right for capital protection or left for return?

Credit opportunities: Subordinated debt as an alternative to high income strategies

European high yield – this cycle is different

Diversification of income streams to deliver sustainable income for clients

Prospects for the European Economic and Monetary Union

Long term changes and trends in the global economy

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Group Discussions

» Steven Logan, Aberdeen Asset Management
» Jörg de Vries-Hippen, Allianz Global Investors
» Raphaëlle Moysan, Aviva Investors
» Jean Medecin, Carmignac
» Alex Homan, Fidelity International
» David Zahn, Franklin Templeton
» Grégoire Mivelaz, Atlanticoammun S.A. for GAM
» Nick Cowley, Henderson Global Investors
» Jason Pidcock, Jupiter Asset Management Ltd.
» Michael Browne, Martin Currie an affiliate of Legg Mason
» Tarek Saber, NN Investment Partners
» Alexandre Mouthon, Pictet Asset Management
» Andrew Dreaneen, Schroders
» Jennifer Catlow, Standard Life Investments
» Arif Husain, T. Rowe Price

Keynotes

» Dr. Nouriel Roubini, Roubini Global Economics
» Peer Steinbrück, former Federal Minister Member of the German Bundestag
» Yanis Varoufakis, former Greek Finance Minister

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» Jennifer Catlow, Standard Life Investments
» Arif Husain, T. Rowe Price
Wednesday, 13 April 2016

4.30 pm  Registration and coffee

5.00 pm  Welcome by the day’s moderator

Reto Lipp, Moderator ECO – Swiss radio and TV’s business magazine

5.15 pm  KEYNOTE
Democratising the Euro – risks and opportunities for Switzerland

Yanis Varoufakis, former Greek Finance Minister

6.00 pm  PANEL
The Big Picture
» Monetary policy: normalization or divergence?
» Are low or even negative interest rates the new normal?
» The investor’s risks and opportunities

Larry Hatheway, Group Chief Economist GAM
Frank Häusler, CIO Marcuard Family Office
Jean Medecin, Member of Investment Committee Carmignac
Simon Smiles, Chief Investment Officer UHNW
UBS Switzerland AG

Your host: Reto Lipp, Moderator ECO – Swiss radio and TV’s business magazine

6.50 pm  KEYNOTE
Prospects for the European Economic and Monetary Union

Peer Steinbrück, former Federal Minister Member of the German Bundestag

7.30 pm  Dinner and Networking
Thursday, 14 April 2016

8.30 am  Registration and coffee

9.00 am  Welcome by the day’s moderator

Clifford Padevit, Deputy Editor-in-chief Finanz und Wirtschaft

9.15 am  INTERVIEW
What does it take to become a top performer?

Stefan Edberg, Roger Federer’s coach 2014/15

Your host: Clifford Padevit, Deputy Editor-in-chief Finanz und Wirtschaft

10.00 am  PANEL
The Swiss banking sector and Europe

» Do Swiss banks require open access to EU markets?
» How do we achieve this goal?
» What are the alternative scenarios?
» In a world of automatic exchange of financial account information (AIA) what attributes can help the Swiss financial centre compete with international finance centres?

Lionel Aeschlimann, Managing Partner Mirabaud, and CEO Mirabaud Asset Management
Dr. Michael Loretan, Head of Asset Management Eidgenössische Finanzmarktaufsicht FINMA
Andreas Przewloka, Operating Head Wealth Management Europe UBS AG
Jürg Staub, General Partner and CEO Reichmuth & Co Privatbankiers

Your host: Clifford Padevit, Deputy Editor-in-chief Finanz und Wirtschaft

10.45 am  Coffee Break
11.25 am  PARALLEL GROUP DISCUSSIONS – CYCLE 1

1 European high yield – this cycle is different
Steven Logan, Head of European High Yield
Aberdeen Asset Management

2 Zukunftsperspektiven europäische Aktien: Dividenden-strategien als tragender Renditepfeiler im Tiefzinsumfeld
Jörg de Vries-Hippen, CIO Equity Europe
Allianz Global Investors

3 Diversification of income streams to deliver sustainable income for clients
Raphaëlle Moysan, Senior Investment Director Multi-Assets
Aviva Investors

4 Emerging market equities with focus on China
Jean Medecin, Member of Investment Committee
Carmignac

5 Emerging markets equities: Benefits of an active investment philosophy and a consistent approach
Alex Homan, Investment Director Emerging Markets Equities
Fidelity International

6 The cons and cons of the European economy...
And the pros for European fixed income
David Zahn, Head of European Fixed Income
Franklin Templeton

7 Credit opportunities: Subordinated debt as an alternative to high income strategies
Grégoire Mivelaz, Fund Manager Atlanticomnium S.A. for GAM

8 Risky business – all weather global emerging markets investing
Nick Cowley, Fund Manager Emerging Markets
Henderson Global Investors

9 Unlocking Asia’s dividend potential
Jason Pidcock, Fondsmanager Jupiter Asset Management Ltd.

10 European equities in a world of no return
Michael Browne, Investment director, European Long/Short
Martin Currie an affiliate of Legg Mason
11 Convertible bond allocations in a low-yielding investment world
Tarek Saber, Head of Convertible Bonds & Lead Portfolio Manager Convertible Bonds NN Investment Partners

12 Robotics – the next revolution in technology?
Alexandre Mouthon, Senior Client Portfolio Manager Pictet Asset Management

13 Liquid alternatives
Andrew Dreaneen, Head of Schroder GAIA Product & Business Development Schroders

14 GFS: Unconstrained return generation + consistent low volatility = Absolute returns from a multi strategy concept
Jennifer Catlow, Portfolio Manager Global Focused Strategies Standard Life Investments

15 Fixed income markets are at a crossroad, which way should investors turn? Right for capital protection or left for return?
Arif Husain, Head of International Fixed Income T. Rowe Price

12.10 pm Changeover

12.20 pm PARALLEL GROUP DISCUSSIONS – CYCLE 2

1.05 pm Networking lunch

2.25 pm PARALLEL GROUP DISCUSSIONS – CYCLE 3

3.10 Uhr Coffee Break
PROGRAM

3.40 pm  PANEL
Digitising in Banking
- RoboAdvice and other disruptive technologies in Wealth Management
- Blockchain and Cryptocurrency: What you need to know
- Cooperation or Confrontation: How new and old players meet at the financial centre

Dr. Jochen Gutbrod, Chairman b-to-v Partners AG
Hanspeter Rhyner, CEO Glarner Kantonalbank

Your host: Valentín Ade, Editor Finanz und Wirtschaft

4.25 pm  KEYNOTE
Long term changes and trends in the global economy

Dr. Nouriel Roubini, Chairman and Co-founder Roubini Global Economics

5.10 pm  Summary by the day’s moderator
5.15 Uhr  Networking-Apéro

Simultaneous interpreting will be provided throughout (German/English).
VENUE

Gottlieb Duttweiler Institute
Langhaldenstrasse 21
8803 Rüschlikon/Zürich
Tel. +41 44 724 61 11

www.gdi.ch

Close to Zurich, Switzerland’s business and cultural centre, the GDI is located in the historic «Park im Grüene», an oasis of well-being and creativity overlooking Lake Zurich and offering spectacular panoramic views from Zurich to the Alps – this unique location lifts both the mind and spirit.

ADMISSION

Admission is free and by personal invite only.

CONTACT

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Conceptual design and content
Pascal Novotny, Managing Director

Further information and registration
www.fundexpertsforum.com
How to participate.
To guarantee an open and trusting atmosphere, participation in the conference is limited to decision makers working in private wealth management (banks, family offices, independent asset managers, public pension schemes). Participation is not an automatic right.

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Registering for the free conference
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Kindly send your application by fax to: +41 44 274 28 54
or register online: www.fundexpertsforum.com

☐ Yes, I will attend the conference on 13 and 14 April 2016 in Rüschlikon/Zurich and have chosen to attend the following three group discussions (see brochure):

☐ I am also interested in a meeting with the following partner companies (see brochure):

Kindly send me further information on the following group discussions (see brochure):

☐ I agree to subscribe to «Finanz und Wirtschaft» and will receive hard copy and digital access for 3 months for CHF 121.– (incl. VAT).

The number of participants is limited. Your registration will be dealt with in strict order of receipt of applications.

Surname            First name
Job title
Tel                Email
Company
Street               Place incl. post code
Sector
Date, signature

The following colleague of mine is also interested in attending the conference:

Surname, first name    Job title
Company                Email

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