



Australian  
Shareholders'  
Association

# 2024 INVESTOR CONFERENCE

# PROGRAM

19-21 MAY | MELBOURNE



# VALUE INVESTOR WORKSHOP

Spend an evening in the life of an investment analyst, getting all of your questions answered.

Join Owen Rask, alongside Leigh Gant, for an enriching half-day intensive investor training, covering must-know topics inside and outside the spreadsheet.

## TOPICS

1. Develop an investment process
2. Screening & filtering strategies
3. Connecting financial statements
4. Identify bad operators
5. Discounted cash flow, IRR & more
6. Competitor research
7. Develop an investment thesis
8. ASX case studies



**DATE:** Sunday, 19 May  
**TIME:** 2.00 PM - 5.00 PM  
**LOCATION:** Rydges Melbourne

# SOCIAL INSIGHTS EVENING

The ASA's Investor Insights Evening marks the commencement of our premier Conference, setting the stage for two days of strategic learning and networking. As the prelude to our Conference, we invite attendees to an accessible, relaxed setting that's ripe for networking, learning, and genuine enjoyment.



**EVAN LUCAS**  
LEADING  
ECONOMIST AND  
MEDIA PERSONALITY



**OWEN RASK**  
FOUNDER, RASK



**JESSICA AMIR**  
MARKET ANALYST,  
MOOMOO



**HENRY JENNINGS**  
MARKET STRATEGIST  
AND ANALYST,  
MARCUS TODAY



**MARC JOCUM**  
PRODUCT &  
INVESTMENT  
STRATEGIST, GLOBAL  
X ETFS AUSTRALIA

 moomoo  
marcustoday.

 RASK  
GLOBAL X

## SESSIONS

**All the dumb stuff I've done with money** - Owen Rask

**Mind Over Money** - Evan Lucas

**Buy, Hold, Sell** - Jessica Amir & Henry Jennings

**How to Beat the Professionals At Their Own Game** - Marc Jocum

**DATE:** Sunday, 19 May  
**TIME:** 5.30 PM - 8.00 PM  
**LOCATION:** Rydges Melbourne

# YOUR SPEAKERS



**Phil Muscatello**  
MC, podcast host and  
ASA member



**Joe Aston**  
Former AFR Rear  
Window Columnist



**Christine  
McLoughlin** AM  
Chair, Suncorp



**Philip Chronican**  
Chair, NAB



**Patricia McKenzie**  
Chair, AGL



**Richard White**  
CEO and Founder,  
WiseTech Global



**David Dzienciel**  
Chief Customer and  
Commercial Officer,  
NEXTDC



**Debby Blakey**  
President, ACSI and  
CEO, HESTA



**Warren Hogan**  
Managing Director, EQ  
Economics & Economic  
Advisor



**Dr Sam Hupert,**  
CEO, Pro Medicus



**Jacob Varghese**  
CEO, Maurice  
Blackburn



**Mary Delahunty**  
CEO, ASFA



**Phil Slade**  
Founder, Decida



**Peter Marix-Evans**  
CEO, SHAPE Australia  
(ASX:SHA)



**Senator Andrew Bragg**  
Senator for New South  
Wales at Commonwealth  
of Australia



**Bec Wilson**  
Author, columnist for  
SMH/Age Money Section  
and podcaster



**Owen Rask**  
Founder, Rask



**Ian Irvine**  
CEO, Listed Investment  
Companies & Trusts  
Association (LICAT)



**Brendan Malone**  
Managing Director and  
Group CEO Raiz Invest



**Craig Keary**  
CEO, Selfwealth



**Julieanne Mills**  
Director, Australian  
Shareholders'  
Association



**Ian Curry**  
Director, Australian  
Shareholders'  
Association



**Chris Andrews,**  
CEO, LaTrobe  
Financial



**Emma Davidson**  
CEO, Staude Capital  
Global Value Fund



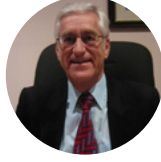
**Doug Morris**  
CEO, Sharesight



**Mark Freeman**  
Managing Director  
Australian Foundation  
Investment Company



**Mike Robey**  
Victorian Company  
Monitoring Committee  
Co-Chair



**Howard Coleman**  
Director, Teaminvest



**Kathleen Yeung**  
Global Head of Corporate  
Development



**Andrew Lockhart**  
Managing Partner,  
Metrics Credit Partners



**Sam Kazacos**  
Investment  
Specialist, Antipodes



**Don Hamson**  
Managing Director, Plato  
Income Maximiser Limited



**Miles Staude**  
CIO, Staude Capital  
Global Value Fund



**Jamie Nemtsas**  
Director, Wattle  
Partners



**Lukas de Pourbaix**  
Global Cross Asset  
Specialist, Fidelity  
International



**Cameron Gleeson**  
Senior Investment  
Strategist



**Darin Tyson-Chan**  
Editor, smstrusteenews



**Travis Butcher**  
Fund Manager,  
Charter Hall



**Tracey Wahlberg**  
Investment Analyst,  
Magellan



**Nick Healy**  
Portfolio Manager,  
WAM Global



**Philip Brown**  
Head of Research,  
FIIG Securities



**Julian Campbell-Wood**  
Portfolio Manager,  
Resolution Capital



**Elfreda Jonker**  
Portfolio Manager,  
Alphinity



**Marcus Padley**  
Director, Marcus  
Today



**Henry Jennings**  
Market Strategist  
and Analyst, Marcus  
Today



**Richard Goldman**  
Board, Australian  
Shareholders'  
Association



**Rachel Waterhouse**  
CEO, Australian  
Shareholders'  
Association



**Steven Mabb**  
Chair, Australian  
Shareholders'  
Association



# DAY 1 - Monday 20 May

## MORNING SESSIONS

### 9.00 AM **ASA Investor Conference 2024 Welcome**

**Phil Muscatello**, MC, podcast host and ASA member



### 9.10 AM **Revolutionising Healthcare: A Vision for the Future with AI**

**Dr Sam Hupert**, Chief Executive Officer, Pro Medicus

Enjoy this visionary keynote exploring the transformative role of AI in healthcare. Discover the latest in medical imaging innovation and the future possibilities for enhancing diagnostic precision and patient care. Gain insights into how AI-driven technologies are redefining healthcare, opening new avenues for investors and improving outcomes globally.



### 9.40 AM **ASA Company Awards: Celebrating Excellence**

**Steven Mabb**, Chair, ASA

**Rachel Waterhouse**, CEO, ASA



The ASA Company Awards highlight outstanding achievements in corporate governance and shareholder communication. The Enhanced Company Governance Award celebrates companies that elevate corporate governance standards, emphasising improvements in remuneration structures and commitment to ESG initiatives. The Most Effective Shareholder Communications Award recognises companies that excel in transparency and engagement, evidenced by initiatives such as pre-AGM sessions, plain-English reporting and hybrid shareholder meetings.

### 9.45 AM **Navigating Governance: Insights, Vision and Transparency**

**Debby Blakey**, President, ACSI and CEO, HESTA

**Jacob Varghese**, CEO, Maurice Blackburn

**Mike Robey**, Former ASA Board member and Chair of ASA's Policy Committee

**Moderator: Rachel Waterhouse**, CEO, Australian Shareholders' Association



What makes good governance? Join our experts in exploring effective leadership and the power of influence over the investment landscape. Gain valuable insights into ASA's Focus Issues for the 2024 AGM season and the importance of the 40:40 Vision. Additionally, this discussion will cover the proposed changes to the ASX Corporate Governance Council's Governance Principles and Recommendations designed to strengthen listed entities' governance and increase transparency for investors.

## 10.30 AM - MORNING TEA

### 11.00 AM **Investing Outside the Norm**

**Julian Campbell-Wood**, Portfolio Manager (Global REITs), Resolution Capital

**Andrew Lockhart**, Managing Partner (Australian Private Debt), Metrics Credit Partners

**Sam Kazacos**, Investment Specialist (Global Equities), Antipodes

**Moderator: Phil Muscatello**, MC, podcast host and ASA member



Join our esteemed panel who are seeking a new narrative beyond the usual investment landscape. Hear direct insights drawing on their diverse experiences.

### 11.45 AM **Big Super: Influence and Implications in the Superannuation Sector**

**Senator Andrew Bragg**, Senator for New South Wales at Commonwealth of Australia

**Mary Delahunty**, CEO, ASFA

**Moderator: Darin Tyson-Chan**, Publisher, Editor selfmanagedsuper, smstrusteenews and Financial Observer



This session will explore the expanding role of Australian superannuation funds as providers of long-term patient capital and their impact on market dynamics—as investors, asset managers, and drivers of change in corporate governance. We will also discuss the potential impacts on retail investors and the considerations for capping ownership in listed companies.

## 12.30 PM - LUNCH

## ASA CONVENOR AND MONITOR CATCH UP

## BREAKOUT SESSIONS

### 1.30 PM **The Global Consumer: Structural Growth Opportunities**

**Tracey Wahlberg**, Investment Analyst, Magellan



Discover how evolving consumer behavior, pandemic-driven demand shifts, and disinflation are shaping the global consumer sector's returns over the next 3-5 years. Learn about the role of AI in revolutionizing beauty personalization and commerce and adapt your investment strategy to thrive in this evolving landscape.



### **The Evolution of Global AI Investing in 2024**

**Elfreda Jonker**, Portfolio Manager, Alphinity

Explore the future of Generative AI beyond the headlines and market frenzy of 2023. Discover Alphinity's balanced approach to investing in early AI beneficiaries and the broader AI ecosystem, as well as the evolving landscape of AI investment. Gain insights into the future opportunities and risks associated with AI, including potential investment strategies and key players in the AI ecosystem beyond the Magnificent 7.



# DAY 1 - Monday 20 May

## BREAKOUT SESSIONS

### 2.10 PM **Is It Possible to Outperform Passive Investing?**

**Emma Davidson**, CEO, Staude Capital Global Value Fund  
**Miles Staude**, CIO, Staude Capital Global Value Fund

Join Emma and Miles as they engage in a lively debate on the merits of passive vs. active investing. Emma will present the case for passive investing, while Miles will advocate for active fund management. As a married couple who co-own their own company, their differing perspectives promise to make this session both entertaining and enlightening!



### **Behaving Yourself: The Easiest Way To Get \$100,000 Income From Stocks**

**Owen Rask**, Founder, Rask

Create a retirement portfolio capable of yielding 5% using nothing but a brokerage account - and without picking stocks. Join Owen as he identifies the exact investments he is buying today, including simple long-term options with franking credits.

### 2.50 PM **Why The Closed-end Structure of LICs and LITs is suited to long-term investing**

**Mark Freeman**, Managing Director Australian Foundation Investment Company  
**Don Hamson**, Managing Director, Plato Income Maximiser Limited  
**Kathleen Yeung**, Global Head of Corporate Development  
**Moderator: Ian Irvine**, CEO, Listed Investment Companies & Trusts Association (LICAT)

Join this insightful panel discussion to understand which structure is ideal for investors seeking diversified portfolios or stable income streams in retirement.



### **Building and Tracking a Global Multi-Asset Class Portfolio**

**Doug Morris**, CEO, Sharesight

Diversifying across multiple asset classes is not just a strategy but a necessity for the savvy investor. In this session, Doug delves into all things asset allocation from a multi asset class perspective with the aim of demonstrating how you can keep track of your own personal asset allocation strategy.

## 3.25 PM - AFTERNOON TEA

## AFTERNOON SESSIONS

### 3.55 PM **Navigating The AI Evolution: Insights and the Future**

**Richard White**, CEO and Founder, WiseTech Global  
**David Dzienciol**, Chief Customer/Commercial Officer, NEXTDC  
**Moderator: Richard Goldman**, ASA Board Member

AI is here, now what? Join industry innovators to unpack the potential and implications of transformative AI, for business and society. Discover how AI is shaping industries and uncovering investment opportunities in this rapidly evolving landscape.



### 4.40 PM **Unlocking Value: A Deep Dive with Small Cap Innovators**

**Craig Keary**, CEO of Selfwealth  
**Peter Marix-Evans**, CEO, SHAPE Australia (ASX:SHA)  
**Moderator: Steven Mabb**, Chair, Australian Shareholders' Association

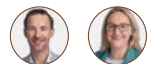
Learn about the strategies, achievements and outlook of leading small-cap companies as they share personal perspectives. Jump into our exclusive Q&A session, gaining firsthand insights into company visions and asking the questions that matter to you as an investor.



### 5.25 PM **ASA Individual Awards**

**Steven Mabb**, Chair, Australian Shareholders' Association  
**Rachel Waterhouse**, CEO, Australian Shareholders' Association

Join us over drinks to celebrate outstanding contributions to the ASA community with the Individual Awards. The Convenor of the Year Award acknowledges individuals who organise engaging local member meetings, fostering discussions on investment topics. The Monitor of the Year Award recognises excellence in company monitoring activities, including insightful reporting and engagement. Finally, the Lifetime Achievement Award honours longstanding ASA members who have shown leadership and positively influenced the organisation's culture.



## 5.35 PM - COCKTAIL HOUR



# DAY 2 - Tuesday 21 May

## MORNING SESSIONS

**8.55 AM** **ASA Investor Conference 2024 Welcome**  
**Christine Haydon**, Victorian State Chair



**9.00 AM** **Will Australia Remain on the RBA's 'Narrow Path'? Australia's economic outlook for 2024/25 in a global and political context**  
**Warren Hogan**, Managing Director, EQ Economics & Economic Advisor



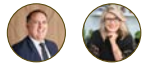
Amidst global and political uncertainties, Warren Hogan explores the economy's progression in returning inflation to target, potential risks from geopolitical tensions and the impact of government policies on interest rates. How are Australian businesses navigating challenges such as margin pressures and soft consumer spending, and what this means for the coming financial year.

**9.35 AM** **Future of Investments**  
**Chris Andrews**, CEO, LaTrobe Financial



The future isn't what it used to be. Chris investigates long-term risks facing Australian investors, and how favourable market tailwinds can be used to secure your financial future.

**10.10 AM** **Good retirement, bad retirement, best retirement**  
**Jamie Nemtsas**, Director, Wattle Partners  
**Bec Wilson**, Author, columnist for SMH/Age Money Section and podcaster



Explore the nuances of retirement planning, from navigating the complexities of superannuation to securing your financial legacy. Uncover actionable strategies to optimise your retirement savings, manage risks effectively, and pave the way for a comfortable retirement lifestyle.

## 10.45 AM - MORNING TEA

### BREAKOUT SESSIONS

**11.15 AM** **Why Social Infrastructure is an Attractive Asset Class**  
**Travis Butcher**, Fund Manager, Charter Hall



Does your investment portfolio reach far and wide? Join Travis as he explores this diverse social infrastructure property sector, providing stable and economically resilient long-term returns.



**Raiz Your Game: Improving Financial Literacy and Building Wealth for all Australians**  
**Brendan Malone**, Managing Director and Group CEO Raiz Invest

Financial literacy and building wealth are more important than ever. See how Raiz Invest is making a difference and break the generational cycles and impacting all Australians by making it easy to understand investing and breaking down the barriers to market entry.

**11.55 AM** **Beyond Global Mega Caps**  
**Lukasz de Pourbaix**, Global Cross Asset Specialist, Fidelity International



Many Australian investors have a strong preference for domestic stocks over global stocks. This is particularly the case for small and mid-cap (SMID) companies as the scale of the global opportunity set is simply too large for most investors to contemplate. However, it's the size and diversity that makes SMID equity investing at the global level so attractive. Find out from Fidelity how they view the SMID universe and the role research plays in finding companies in their earlier stages of growth.



**Are You Averaging 15-20% Returns on Your ASX Investments with Low Risk?**  
**Howard Coleman**, Director, Teaminvest Private

Howard will discuss beneficial investment tools and strategies utilised within a well-constructed low risk ASX portfolio to supercharge 15-20% returns per year, with a high level of safety over the long-term.

## 12.30 PM - LUNCH

## SHARESIGHT WORKSHOP

Join Sharesight CMO Prashant Mohan as he demonstrates how Sharesight can help you become a smarter investor. In this exclusive session, you'll see first-hand how you track all your investments in one place using Sharesight - everything from shares, managed funds, ETFs, LICs, and managed funds, to foreign currencies (including cryptocurrencies).



## DAY 2 - Tuesday 21 May

### BREAKOUT SESSIONS

**1.30 PM** **Active vs Passive: It's More Than Just the Funds You Choose**  
**Cameron Gleeson**, Senior Investment Strategist, Betashares



Discover how investors can avoid self-sabotage and maximise returns beyond passive investment strategies. Delve into SPIVA data highlighting the success of passive over active strategies. Learn from expert asset allocators, including financial institutions and super funds, about their approach to portfolio construction and how investors can apply these insights to their own portfolios.

**2.15 PM** **The Role of Bonds in a Balanced Investment Strategy**  
**Philip Brown**, Head of Research, FIIG Securities



Understand the role bonds play in a balanced approach to wealth management - where combining equities and direct bonds, or bonds through managed funds, can benefit investors from the growth potential of stocks and the stability of fixed income.



**Undiscovered Global Gems**  
**Nick Healy**, Portfolio Manager, Wilson Asset Management

Understand the dynamic landscape of global equity markets, highlighting the investment opportunities within artificial intelligence. Nick will explore the WAM Global investment process and the key themes his team monitors: digital enterprise, electronic marketplaces, innovative health and critical assets.



**Tickers on a Platter**  
**Marcus Padley**, Director, Marcus Today  
**Henry Jennings**, Market Strategist and Analyst, Marcus Today

Warren couldn't make it, so we secured the next best thing. Join Marcus and Henry for an engaging fireside chat on stock themes for the new year, ETF strategies, and essential do's and don'ts.

### 3.00 PM - AFTERNOON TEA

**3.30 PM** **Leadership in Action: Navigating Corporate Challenges**  
**Philip Chronican**, Chair, NAB  
**Christine McLoughlin AM**, Chair, Suncorp  
**Patricia McKenzie**, Chair, AGL  
**Moderator: Joe Aston**, Former AFR Rear Window Columnist



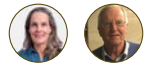
Join us for an engaging panel at the ASA Conference, moderated by former AFR Chanticleer columnist Joe Aston. He will facilitate a thought-provoking discussion with Philip Chronican, Christine McLoughlin AM and Patricia McKenzie on corporate leadership and accountability. Expect a session rich with insights and examples of how these leaders confront significant business challenges daily.

**4.15 PM** **Living with Apes. The brain, the pain, and one thing that changes everything**  
**Phil Slade**, Founder, Decida



Behavioural economics and the psychology of risk decision making is often talked about, but doesn't always seem very practical. In this session we explore the brain, common decision making bias; and one thing we can do to immediately improve our decision making today.

**4.55 PM** **Monitoring Session**  
**Julianne Mills**, Director, Australian Shareholders' Association  
**Ian Curry**, Director, Australian Shareholders' Association



Gain insights into effective company monitoring practices, including strategies for analysing financial reports, evaluating corporate governance, and assessing company performance. Learn how to stay informed and engaged as a shareholder to make informed investment decisions.

**5.20 PM** **Conference Closing**  
**Rachel Waterhouse**, CEO, Australian Shareholders' Association



**5.30 PM** **ASA AGM**

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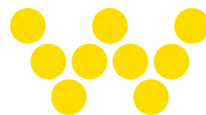
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GLOBAL VALUE FUND

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