

AGENDA: 11 MAY 2026

Monday, 11 May 2026 – In person (and live streamed) at The Lord Charles, Somerset West, Cape Town			
Day 1	Theme	Presenting Company	Speakers
09:00 – 09:05	Welcome	Apex Investment Consulting SA	Eugene Braak
09:05 – 10:00	Multi Asset Views & positioning	Granate Asset Management Centaur Asset Management Contrarius Investment Management	Henno Vermaak Nick de Vos Simon Raubenheimer
10:00 – 10:50	Fixed Income Views and Opportunities	Portfolio Metrix Anchor Asset Management Methodical Investment Management	Philip Bradford Nolan Wapenaar JP du Plessis
10:50 – 11:15	TEA BREAK		
11:15 – 12:10	Global Equity Views & Opportunities	MIPlan / ThinkCell All Weather Capital Northstar Asset Management	Tony Bell TBC Adrian Clayton
12:10 – 13:05	Global Fixed Income and SA Credit	Ninety-One Aluwani Capital Partners Fairtree	Adam Furlan Conrad Wood Paul Crawford
13:05 – 13:50	LUNCH & NETWORKING		
13:50 – 14:45	Domestic Equity Views and opportunities	Vunani Fund Manager Investec Investment Management Oyster Catcher Investments	Jami Jephthas Chris Holdsworth TBC
14:45 – 15:40	Global Equity Views & Opportunities	Ranmore Funds BlueAlpha Investment Management Artisan Partners	Sean Peche Richard Pitt Ryan Wood
15:40 – 15:45	DAY 1 - CONFERENCE CLOSE.		
15:45 – 20:00	NETWORKING DRNKS, ENTERTAINMENT & EARLY DINNER		

AGENDA: 12 MAY 2026

Tuesday, 12 May 2026 – In person (and live streamed) at The Lord Charles, Somerset West, Cape Town			
Day 2	Theme	Presenting Company	Speakers
09:00 – 09:05	Welcome	Apex Investment Consulting SA	Eugene Braak
09:05 – 09:45	SA Domestic Equity Views and opportunities	Bateleur Capital	Charl Gous
		Argon Asset Management	Ian Brink
09:45 – 10:40	Multi Asset Views & positioning	36ONE Asset Management	Zandile Nkwanyana
		Sasfin Asset Managers	Arno Lawrenz
		Fairtree	Chantelle Baptiste
10:40 – 11:00	Global & Domestic property views and positioning	Sesfikile Capital	Evan Jankelowitz
11:00 – 11:25	TEA BREAK		
11:25 – 12:35	Fixed Income Views and Opportunities	Cadiz Asset Management	Sidney McKinnon
		Laurium Capital	Shwebi Gqosha
		Visio Fund Management	Jonathan Myerson
		Saffron Wealth	Brandon Quinn
12:35 – 13:30	Global Equity Views & Opportunities	Mazi Asset Management	Andreas van der Horst
		Coronation Fund Managers	Marc Talpert
		Credo	Jarrold Cahn
13:30 – 13:35	DAY 2 - CONFERENCE CLOSE		
13:35	LUNCH & NETWORKING		