Agenda

Tuesday, October 21

9:30am - 11:00am **Coach transfers depart Melbourne Airport**

9:30am - 11:00am **Coach transfers depart Melbourne CBD**

11:30am - 12:30pm **Registration and light lunch**

12:30pm - 12:35pm **Welcome remarks**

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

12:35pm - 1:25pm **Panel: Trade, tech and territorial wars**

Investors are adjusting to a new world order that encapsulates an unpredictable Trump administration that is reshaping global trade, leading to new bilateral trade agreements and a focus on national interests, including greater expenditure on defence. Meanwhile, the transformative impact of AI could be a positive force for productivity or derail the global economy by slashing jobs. This panel will discuss how asset owners are tackling these macro themes and consider the latest strategies for building portfolio resilience.

Includes table discussion

Kate Misic
Acting chief investment officer, TelstraSuper

Patrick Nicoll
Head of asset allocation, MLC Super

Alvin Tan
General manager – portfolio construction and risk, HESTA

Craig Thorburn
Director, research and insights, Future

Aleks Vickovich
Editor-in-chief, Conexus Financial

Fund

1:25pm - 2:00pm

Keynote: Private markets and the new architecture of capital

In this keynote, Alicia Gregory will explore how geopolitical risk, capital flows and a multi-polar world are reconfiguring private markets and investor behaviour. Drawing on her experience at the Future Fund and Blue Owl, she will outline the impact of these forces over the next decade, the changing nature of specific private market assets, and the future of the US as the world's home of innovation and the deepest capital markets.

Alicia Gregory
Managing director, Blue Owl

Aleks Vickovich
Editor-in-chief, Conexus Financial

2:00pm - 2:25pm

Afternoon tea

2:25pm - 3:10pm

Panel: Australian renewables and the global transition

The accelerating momentum of renewable energy investment is reshaping long-term portfolio strategies for asset owners, even as the US political and regulatory landscape grows more complex in the world's largest economy. This panel will examine what the recent spate of Australian asset owner-backed deals means for the local energy transition, the political and regulatory landscape, and the evolving balance of valuations, opportunities, and risks in the sector.

David Allen
Deputy chief investment officer and head of alternatives, Future Group

Sam Reynolds
Chief executive, Octopus Australia

Neil Stanford
Investment specialist – alternatives, Escala Partners

Lachlan Maddock
Editor, Investment Magazine

3:10pm - 3:50pm

International keynote: Climate, alpha and YFYS across asset classes

This keynote address will explore the evolution of climate investing approaches, including low-carbon strategies and climate solutions, Paris-aligned and climate transition benchmarks, and forward-looking climate transition focus and engagement. It will demonstrate how these approaches can be implemented in portfolio construction alongside achieving risk-adjusted returns in line with investors' requirements.

Remmert Koekkoek
Head of investment solutions, Robeco (The Netherlands)

Colin Tate AM
Founder and managing director, Conexus Financial

3:50pm - 4:35pm

Panel: Emerging markets and the US pivot

Emerging markets have historically fared poorly during heightened periods of volatility, but recent geopolitical shifts are challenging that assumption as investors reallocate capital away from the US. This panel will consider whether underlying EM fundamentals are accelerating and which regions could benefit in this new environment. It will also consider EM opportunities beyond equities and look at how asset owners are managing risk through a new lens.

Mark Aarons
Head of asset classes, Victorian Funds Management Corporation

Luis Fernando Lopes
Partner and chief economist, Patria

Zoe McHugh
Head of portfolio strategy, Australian Retirement Trust

Chris Trevillyan
Director of investment strategy, Frontier Advisors

Lachlan Maddock
Editor, Investment Magazine

4:35pm - 5:50pm

Workshop: Conflict and commerce in the Trumpian Age

The world is rapidly changing as entrenched historical and media narratives, as well as economic and diplomatic structures, are reshaped by the unorthodox Trump Administration. Professor Stephen Kotkin, a renowned expert on geopolitics and authoritarian regimes, will examine the concept of US exceptionalism, alongside his outlook on international relations, war and peace in the world.

Includes table discussion

Professor Stephen Kotkin
Kleinheinz Senior Fellow, Hoover Institution, Stanford University (United States)

Colin Tate AM
Founder and managing director, Conexus Financial

5:50pm - 5:55pm	**Closing remarks**
6:00pm - 10:00pm	**Welcome reception and on-site dinner**

Wednesday, October 22

8:30am - 8:55am	**Arrival refreshments**
8:55am - 9:00am	**Opening remarks**

9:00am - 9:40am **International keynote: An unusual bull market of divergence, and confusion**

Against a chaotic background of high and rising government debt burdens, a US tariff assault on top of heightened geopolitical risks, and the Fed in the political crosshairs government bonds have struggled to keep up with cash while credit has delivered strong returns. Will this continue, or is it time for a rotation to duration?

Robert Tipp
Chief investment strategist and head of global bonds, PGIM Fixed Income (United States)

Aleks Vickovich
Editor-in-chief, Conexus Financial

9:40am - 10:30am

Panel: Alpha and beta equities in a benchmark-
aware world

Passive, low-cost strategies dominate today's equity portfolios given the long-term underperformance of active equity managers and high levels of market concentration. However, a more volatile market environment, a return of market breadth, and the rise of big data and AI, are once again opening up the possibility of extracting alpha from public markets. A look at the latest asset owner thinking in world still constrained by Your Future Your Super for super funds and a range of competing considerations for all institutional investors.

Dominique d'Avrincourt
Head of equities, Telstra Super

Matthew Gadsden
Head of research execution, JANA Investment Advisers

Mark Rider
Chief investment officer, Brighter Super

Bhanu Singh
Chief executive, Australia and senior investment director, Dimensional Australia

Brendan Swift
Senior investment content editor, Conexus Financial

10:30am - 11:00am **Morning tea**

11:00am - 11:45am

Panel: Rethinking hedge fund allocations amid volatility

A future environment of potentially persistent inflation, rising interest rates and rising geopolitical uncertainty threaten to change the investment landscape and unseat traditional equity-bond correlations. This panel will explore the latest thinking on how various hedge funds strategies can improve portfolio resilience and diversification given a long history of mixed sector performance and concerns over fees and transparency.

Carson Drummond
Manager, liquid alternatives, NGS Super

Katie Petering
Managing director, head of investment strategy for multi-asset strategies and solutions, BlackRock

Andrew Whittaker
Investment director, strategy and implementation, QIC


CHAIR

Brendan Swift
Senior investment content editor, Conexus Financial

11:45am - 12:45pm

Panel: The real asset advantage – returns, risk, and regional opportunities

Unlisted assets continue to deliver for investors over the long-term. A look at the rising demand for real assets including infrastructure and real estate by region and asset class, and the ways asset owners are managing the risks, including in the evolving energy transition sector.

Includes table discussion

Doug Rowlands
Senior director, Invesco Real Estate

William Scott
Head of real assets, Commonweath Superannuation Corporation

Cameron Sinclair
Deputy chief investment officer, head of private markets and infrastructure, Funds SA


CHAIR

Lachlan Maddock
Editor, Investment Magazine

12:45pm - 1:45pm

Lunch

1:45pm - 2:40pm

In conversation: Tackling three big super system challenges

As it grows, the superannuation system faces – and may even be an accelerant or cause of – a number of systemic risks. This interactive session will present latest evidence-based research on super fund investing processes, with a view to collective problem solving.

Includes table discussion

Dr Geoff Warren
Research fellow, The

Aleks Vickovich
Editor-in-chief,

Conexus Institute; Honorary Associate Professor, Australian National University

CHAIR

Conexus Financial

2:40pm - 3:10pm	**Afternoon tea**

3:10pm - 4:00pm

In conversation: Finding method in the market madness

John Pearce has overseen UniSuper's growth from assets under management of just over $20 billion in 2009 to almost $158 billion today. This fireside chat will draw on Pearce's broad financial market and industry experience as he shares his view on markets, the strategies he has employed to grow the fund, and what drives him as an individual.

John Pearce
Chief investment officer, UniSuper

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

4:00pm - 5:00pm

In conversation: Reflections on tragedy, hope and purpose

In a candid conversation, philanthropist and anti-firearms campaigner Walter Mikac will share his personal story and strategies to inspire purpose in the face of loss and tragedy.

Walter Mikac AM
Co-founder, The Alannah and Madeline Foundation

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

5:00pm - 5:05pm	**Closing remarks**
6:50pm - 7:00pm	**Bus transfers to Levantine Hill Estate**
7:00pm - 10:00pm	**Conference dinner | Levantine Hill Estate**

Thursday, October 23

8:55am - 9:00am — **Opening remarks**

9:00am - 10:00am

Case study: Data centres, digital infrastructure and a $24b deal

The foundational role of digital infrastructure in a data-driven world is more critical than ever, with exponential growth in cloud computing and AI driving unprecedented demand for data centres. This session will dive into the investment strategies and fundamentals underpinning this revolution via a behind-the-scenes look at Australia's largest ever data centre deal: Blackstone's $24 billion acquisition of AirTrunk. It will reveal how asset owners should value and consider digital infrastructure – which can combine elements of real estate, private credit, and traditional infrastructure – as well as the outlook for the booming centre sector. It will assess opportunities and risks including power procurement, grid access, and hyperscaler concentration.

Robin Khuda
Founder and chief executive, AirTrunk

Chris Tynan
Head of real estate - Australia, Blackstone

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

10:00am - 10:50am

Keynote: Finding value in an era of equities exuberance

This session will assess whether and where a US sharemarket fuelled by AI and Magnificent Seven hype can offer pockets of value. It will provide a candid overview of dynamics in global equities and suggest traditional value investing may provide institutional asset owners with an antidote to increasing concentration and geopolitical risk in their portfolios.

Includes table discussion

DIGITAL

Brad Kinkelaar
Senior managing director, portfolio manager, Barrow Hanley (United States)

CHAIR

Aleks Vickovich
Editor-in-chief, Conexus Financial

10:50am - 11:20am — **Morning tea**

11:20am - 12:05pm In conversation: Scale, strategy and the shifting role of the CIO

Super funds are in many ways shaped by their chief investment officers, particularly in an environment of structural change. This session will feature an in-depth interview with Mercer Super CIO Graeme Miller, unpacking his approach to investment leadership and governance, with a focus on harnessing competitive strengths and disadvantages, alongside his reflections on both Mercer Super and his previous role leading TelstraSuper’s investment functions.

Graeme Miller
Chief investment officer, Mercer Super

Colin Tate AM
Founder and managing director, Conexus Financial

12:05pm - 12:50pm Panel: Portfolio implications of decumulation

This session looks at the ways asset owners are building portfolios that can deliver sustainable retirement income while managing sequencing risk and volatility that can derail a lifetime of saving.

Seamus Collins
Chief investment officer, Team Super

Wyatt Lee
Head of target date strategies, multi-asset division, T. Rowe Price

Dr Geoff Warren
Research fellow, The Conexus Institute; Honorary Associate Professor, Australian National University

Shang Wu
Portfolio manager - retirement strategy, investment, Aware Super

Brendan Swift
Senior investment content editor, Conexus Financial

12:50pm - 1:40pm International keynote: Innovation ecosystems and the AI arms race

Stanford Professor Stephen Kotkin returns to examine the societal and geopolitical implications of artificial intelligence amid a US–China technological arms race and emerging environment of strategic competition. This keynote address will consider how AI can be harnessed responsibly for maximum benefit and draw on pertinent lessons from history, including how regimes use power.

Professor Stephen Kotkin
Kleinheinz Senior Fellow, Hoover Institution, Stanford University (United States)

CHAIR

Colin Tate AM
Founder and managing director, Conexus Financial

1:40pm - 1:45pm	**Closing remarks**
1:45pm - 2:00pm	**Grab and go lunch**
2:00pm - 3:30pm	**Coach transfers depart to Melbourne CBD and airport**