INDEPENDENT THOUGHT CONFERENCE 2022

MANAGING PORTFOLIOS IN A GLOBAL CRISIS

#INDTHOUGHT22

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SPEAKER BIOGRAPHIES

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6 SEPTEMBER 2022
SYDNEY

Toby Potter Chair, IMAP

Toby has championed IMAP's mission for a number of years and is a key contributor for IMAP (along with others) in the representation to ASIC on recent changes to the MDA regulations and ongoing regulatory matters.

His experience in the wider investments market is extensive and his advice and experience is frequently sought after for his breadth and detail, plus his knowledge of the people in the industry.

His working experience includes key roles for NAB, IOOF, Morningstar, Managed Accounts, SFG Australia.

Vinnie Wadhera Executive Director Institutional & Adviser Business, Betashares

Vinnie is responsible for BetaShares' distribution strategy to institutional investors and financial advisory groups.

Vinnie has extensive experience in the investment management industry. He has held senior distribution roles with ING Australia, Allianz Dresdner Asset Management and Third Link Investment Managers.

Prior to that he was Head of Research at AMP Financial Services responsible for fund manager selection & review and model portfolio construction.

Vinnie has attained the Certified Investment Management Analyst (CIMA®) designation and holds a Bachelor of Commerce degree.

Adam Bowe Portfolio Manager Australia, PIMCO

Adam Bowe is an executive vice president and portfolio manager in PIMCO's Sydney office. He is a permanent member of the Asia-Pacific portfolio committee and has previously served as chair.

Prior to joining PIMCO in 2011, he was responsible for global macro research and trading at Tudor Investment Corporation. He was also previously a director and portfolio manager at UBS Global Asset Management and at Queensland Investment Corporation.

He has 20 years of investment experience and holds a master's degree in quantitative finance from University of Technology, Sydney. He also earned a Bachelor of Commerce, First Class Honours and a Bachelor of Economics from the University of Queensland.

Andy Gardner, CFA Portfolio Manager, Fiera Atlas Global Companies Team

Andy joined Fiera in March of 2021 as part of Fiera's acquisition of AMP Capital's Global Equities capability. Andy has 15+ years of experience as a portfolio manager and equity analyst.

Andy started with AMP Capital in 2012 within the Fundamental Equities team before helping lead the development of AMP Capital's Global Equity capability.

Prior to AMP Capital, Andy spent time working at MF Global where he co-led the build out of their Asia Pacific equity research and principal strategies teams. He began his career in London at Man Group, covering European and US equities.

Andy holds a Bachelor of Science in Economics (first class honours) from Kings College London and is a CFA charterholder.

Andrew Lockhart Managing Partner, Metrics Credit Partners

Andrew has more than 30 years' banking, funds management and financial markets experience and previously specialised in leverage and acquisition finance as well as corporate and institutional lending. His areas of expertise include corporate debt origination, portfolio and risk management and corporate restructuring.

Adrian Mackenzie Partner, Five V Capital

Adrian is the founder and a partner of Five V Capital. A highly experienced investor with over 25 years of private equity experience, Adrian has successfully led and managed Five V's investments, including Ascender, Madman Film & Entertainment, Canva, Plenti, Education Perfect, the Probe Group, Zenith Investment Partners, Openway Food Co, Penten and Automic.

Before founding Five V Capital, Adrian was a managing partner and board member at leading global private equity firm CVC Capital Partners, where he helped establish the Asia Pacific and Australian offices.

Anthony Golowenko Portfolio Manager,, MLC Asset Management

Anthony joined MLC Asset Management's multi-asset Capital Markets Research team in February 2021.

He has 21 years investment experience and is passionate about developing and managing innovative solutions aligned with investor objectives and helping everyday Australians secure their investment journey.

Anthony joins MLCAM from Australian boutique Clime Investment Management, where had overall responsibility for Clime's investment team, strategies and performance outcomes. Here Anthony launched a suite of objective based SMA model portfolios.

He has held previous roles at State Street Global Advisors including Senior Portfolio Strategist – Asia Pacific, Head of Active Australian Equities and Senior Portfolio Manager. He has significant experience in domestic and international equities, return enhancing and risk reducing overlays and objective based strategy development.

Anthony holds a Bachelor of Mathematics and Finance degree with First Class Honours from the University of Technology, Sydney, and is a CFA charterholder.

Alex Donald Head of Funds Management, Director, Ironbark Asset Management

Alex heads up Distribution for Ironbark.

His previous roles have included Head of Investment Sales for Colonial First State, Hill Samuel Asset Management as an equities analyst on their global equities desk, and Zurich Investments as Head of Key Accounts and responsible for Zurich's research house, platform and dealer relationships.

Alex has a BA Hons degree in Politics and French from the University of Wales, Swansea.

Alexandre Ventelon Executive Director, Head of Research Wealth Management - Morgan Stanley Wealth Management

Since arriving at Morgan Stanley, he has developed Wealth Management's multi-asset investment approach which was recognized by the Institute of Managed Account Professionals (IMAP) as the winner in the 2020 and 2021 Licensee Managed Account category, and the 2021Multi Asset Class category.

Alexandre is primarily responsible for producing investment strategy research and providing implementation advice across listed Equities, Managed Funds and ETFs to Morgan Stanley's advisors and their clients.

Alexandre has more than 15 years of investment management experience, in both wealth and institutional money management. Prior to joining Morgan Stanley in 2017, Alexandre spent four years with AustralianSuper as an Investment Strategist; and six years as a Multi-Asset Portfolio Manager with Credit Suisse in Europe, Asia and Australia.

Alexandre holds a Master in Management from Toulouse Business School and a Master in Portfolio Management from the University of Paris XII.

Anne-Sophie Williams Investment Director - Equities, Schroders

Anne-Sophie joined Schroders in May 2022 as an investment director for equities. In this role, she is acting as a bridge between distribution and investment functions, communicating to clients on markets and portfolios as well as helping design equity-based customised solutions in partnership with the investment and solutions teams.

She joins from BlackRock, where she spent four years as an active equities product strategist. Before that, she was an investment writer at Magellan Financial Group and worked in investment communications at QBE Insurance.

She started her career in financial services as an investment specialist at AXA Investment Managers for fixed income and investment solutions.

She holds a Master of Commerce with major in Applied Finance from a French business and management school.

Chris McAlpine, CIMA Co-Founder/Consultant, Context Capital Consulting

Chris is the co-founder and Consultant at the Perth based boutique investment consulting firm Context Capital.

He has extensive actuarial and financial modelling skills and has experience with cash flow forecasting, unit pricing, liquidity analysis and asset liability management. Chris has experience in monitoring investment portfolios, developing investment strategy, portfolio construction, research, performance reporting and writing Board and Investment Committee papers. He has gained experience by working closely with global asset consultants, institutional asset managers and custodians.

His prior experience includes the role of Senior Investment Analyst at WA Super and has held a number of roles in the institutional investment, actuarial and risk management industry.

He holds a Bachelor of Science (Honours Specialisation in Actuarial Science) from Western University in Canada and is a Certified Investment Management Analyst, where he obtained the highest score on the CIMA IMAC course.

He is an Associate of the Society of Actuaries and Canadian Institute of Actuaries. He is completing his studies to become a Fellow of the Society of Actuaries.

Chris is also the winner of the 2019 FEAL PIMCO Scholarship.

Chris Reynolds Investment Analyst, Infinity Asset Management

Chris is responsible for assisting with the management of Infinity's diversified and sector portfolios, including manager research and the provision of relevant financial market insights and updates to its investor base. He has over 5 years of experience in financial markets.

Prior to joining Infinity Asset Management, Chris was an Associate Portfolio Manager within Viridian Portfolio Management, the portfolio management division of Viridian Advisory, where he assisted in the management of the covered call income strategy and sat on the investment committee.

Chris holds a Bachelor of Commerce from The University of Melbourne, majoring in Finance and Economics, and has passed CFA Level II.

Daniel Stojanovski Head of Research, Centrepoint Alliance

Daniel joined Centrepoint Alliance in October 2020 as Head of Research. Daniel has over 9 years of investment experience and joins Centrepoint Alliance from IOOF, where he was previously a Portfolio Manager in their Research team. Daniel had been at IOOF for five and a half years, and was responsible for the management of IOOF's model portfolios, managed accounts, investment philosophy, investment strategy and asset allocation. He also held several responsibilities in research at IOOF, across managed funds, equities, and portfolio research.

Previously to IOOF, Daniel spent two and a half years with Challenger Limited, working across numerous funds at Challenger, under their Fidante Partners Business. Prior to his role at Challenger he also worked at Morgan Stanley within their Investment Management division.

Daniel holds a Bachelor of Commerce degree majoring in Economics and Business Law, from The University of Wollongong and a Master of Finance degree from the University of Technology, Sydney.

David McDonald, CFA Investment Specialist, IMAP

David's role is focused on working to develop a community of interest among the professionals responsible for portfolio management of managed account programs.

He has 30+ years' experience in financial markets. He has worked as an economist, investment strategist, and has extensive experience in equity portfolio management and analysis. He was previously the Chief Investment Strategist for Credit Suisse Private Banking in Australia.

He has worked in institutional asset management and private wealth in Australia and the UK, & started his career as an economist with the Australian government.

David holds a Bachelor of Economics and a Graduate Diploma in Economics (honours) from the Australian National University. He is a CFA Charter holder and holds the Certificate in Investment Performance Measurement designation.

Hugh Holden, CAIA Senior Vice President & Account Manager, PIMCO

Hugh works in the global wealth management team based in Sydney.

Prior to joining PIMCO in 2015, he was an investment specialist with NAB Asset Management in Melbourne. He has 15+ years of investment experience.

Hugh holds a master of economics degree and a bachelor of commerce degree from the University of Sydney.

He is also a Chartered Alternative Investment Analyst and holds a diploma in financial planning.

Dr Isaac Poole, PhD CIMA® Chief Investment Officer, Oreana Portfolio Advisory Services

Isaac joined Oreana Fi in 2018. He previously was Head of Capital Markets Research, Asia Pacific at Willis Towers Watson, and prior to that served as the Chief Economist for the NSW Treasury Corporation.

Isaac has experience working across portfolio management, risk management, economic research, investment strategy and central banking through Australia, the UK and Hong Kong.

Isaac holds a PhD in economics and has studied at the University of Sydney, the University of Oxford and the University of Tasmania. He is a CIMA® certificate through the Investments and Wealth Institute and appears regularly on CNBC and Bloomberg.

Jonathan Ramsay Director, InvestSense

Jonathan Ramsay has over 24 years' experience in asset consulting and funds management in the UK and Australia, where he has held senior roles including Head of Asset Consulting and Chief Investment Officer. At InvestSense, Jonathan helps clients develop and manage their own investment products and is involved in several investment committees. Jonathan is regularly requested to participate in industry events and to provide commentary to media.

Previously, at van Eyk Research, Jonathan had managed recommendations to all external clients on asset allocation, fund selection and portfolio construction. During that time, portfolio construction and management became an increasing focus, and this was ultimately the reason the team launched InvestSense. Jonathan has also been a Senior Consultant with a global asset consulting firm, has run his own independent consultancy, served as CIO for a boutique hedge fund and was Head of Investment Strategy and Risk at an Australian small companies boutique.

Jonathan holds a Bachelor of Arts from the University of East Anglia (England) with Joint Honours in French and Economics. Jonathan qualified as an Associate of the Institute of Investment Management and Research.

John Julian Managing Director, Global Infrastructure Equity, AMP Capital

John Julian is a Managing Director in AMP Capital's Global Infrastructure Equity business, and is the Fund Manager of the AMP Capital Core Infrastructure Fund. John has over 25 years financial sector and investment experience in both legal and commercial roles.

Initially joining AMP Capital as a lawyer, John has worked in a range of legal and commercial roles with AMP Capital and its affiliates in Sydney, London and Chicago.

John joined AMP Capital Global Infrastructure Equity in 2008, and since then has worked closely with the Global Infrastructure Equity team across all aspects of AMP Capital's infrastructure equity investment capability, funds and strategies.

John Wong Manager, Investment Governance, AMP

John has spent 9 years with AMP in a variety of investment positions including a senior analyst the AMP Research team.

Prior roles include Senior Analyst at van Eyk Research.

Katie Petering Head of Investment Strategy, BlackRock

Katie is responsible for BlackRock Australia's range of multi-asset portfolio's, including diversified asset allocation strategies, multi-strategy hedge funds and factor based investments. Katie joined BlackRock in 2017 as Head of Institutional iShares for Australasia, leading the education efforts for institutional adoption of ETFs.

Prior to BlackRock, she was an Executive Director at Goldman Sachs based in Sydney for 13 years, most recently in Fixed Income Currency and Commodities where she was responsible for cross-asset institutional derivative sales including rates, longevity/mortality, alternative risk premia and fund derivatives.

Earlier, she led the Equity Derivative structuring and sales business at Goldman Sachs focusing on the private wealth segment. Katie began her career at Merrill Lynch where she worked for 5 years in both Australia and Hong Kong in the institutional Equity Derivatives sales and structuring team, and also the Equity Capital Markets convertible origination and syndicate teams.

She holds a Bachelor of Business (Accounting) from the University of Technology, Sydney (1996).

Kyle Lidbury, CFA Head of Investment Research, Perpetual Private

Kyle joined Perpetual Private in July 2014 and leads the 20 person Investment Research team. Perpetual Private has $19bn of Funds Under Advice, including $8bn in discretionary multi-manager funds and $4.5bn in direct Australian equities across investment and superannuation funds and platforms.

Kyle is responsible for the overall investment solutions of the firm, managing teams of highly experienced investment professionals across capital markets research, asset allocation, manager research, stock analysis and portfolio construction advice, as well as portfolio analytics and investment insights for client portfolios.

Prior to this role, he was General Manager - Research & Operations for Perpetual Investments, where he managed key ratings house relationships and maximised rating outcomes across all funds and asset classes.

Kyle earned his Bachelor of Accounting with Distinction from the University of Technology, Sydney (1997).

He also holds the Chartered Financial Analyst designation, Chartered Alternatives Investment Analyst designation and is a Certified Practising Accountant.

Lukasz de Pourbaix Executive Director & Chief Investment Officer, Lonsec

Lukasz leads the Lonsec Investment Solutions Pty Ltd (LIS) business, which harnesses Lonsec's research & portfolio construction expertise to deliver portfolio solutions to financial advisers.

Lukasz chairs Lonsec's Asset Allocation Investment Committee and is on the Manager Selection & Direct Equities Investment Committee.

Previous roles include ING Australia, BT Investment Management

Lukasz holds a Bachelor of Commerce & the CIMA designation.

Lukasz is on the board of the Investment Management Consultants Association (IMCA).

Martin Conlon Head of Australian Equities, Schroders

Martin is Head of Australian Equities and involved in the portfolio construction process for Australian Equity Core and Opportunities portfolios, while also retaining analytical responsibilities for Accounting Software, Chemicals/Fertiliser, Diversified Financials & Food Retailing sectors.

Martin joined Schroders in 1994 and was promoted to Head of Australian Equities in October 2003.

Prior to joining Schroders, he was an accountant at Ernst & Young.

He holds a Bachelor of Economics from Macquarie University, a Graduate Diploma in Applied Finance and Investment and is a qualified Chartered Accountant.

Marius Wentzel Head of Client Solutions and Distribution, AMP Capital

Marius Wentzel has extensive financial services industry experience across the South African, United Kingdom, the Australian markets (and some exposure to the Japanese and Chinese markets). His roles have covered life insurance, investment administration, investment solutions, trust & executory and retirement solutions. He has held senior positions in sales, marketing and product management functions, this breadth and depth of experience are ideal enablers to his passion of developing solutions to clients problems and needs. Retirees face many challenges, and Marius believes that the financial services industry is core to providing retirees with peace of mind, leading up to retirement and then for life. This requires solutions and services beyond just financial products, and is achievable when like-minded participants collaborate effectively. Marius holds a Bachelor of Economics and financial planning qualifications from multiple jurisdictions.

Michael Karagianis Senior Consultant, JANA Investment Advisors

Michael heads up an investment consultancy focused on providing advised and implemented solutions to financial advisors.

Prior roles include: Head of Private Investment Consulting at NAB Asset Management, CEO - MC Asset Management, Head of Asset Allocation & Investment Strategy AUS - UBS Global Asset Management, AMP Capital.

He holds an Economics degree from Adelaide University.

Peter Bell Director, Bellmont Securities

Peter is a co-founder and Director of Bellmont Securities.

As well as running Bellmont's Buffett style value investing portfolio - the Bellmont Premium Portfolio, Peter consults to a large number of high net worth, sophisticated investors, and helps run Australia's largest high net worth value investors network, with over 400 members around the country that collectively control well in excess of $1b in Australian equities.

He holds a Bachelor of Commerce (Economics & Finance) from the University of Wollongong, graduating with Distinction.

Tim Murphy, CFA, CAIA Director of Manager Research - APAC, Morningstar

Tim is responsible for leading qualitative research on Australian and New Zealand funds, exchange-traded funds, and listed investment companies, as well as managing Morningstar's model portfolios and relationships with consulting and adviser clients.

Tim is jointly responsible for leading qualitative research on Australian and New Zealand funds, exchange-traded funds, and listed investment companies, as well as managing Morningstar's model portfolios and relationships with consulting and adviser clients in the APAC region.

Before joining Morningstar in 2005, Tim worked in equity derivatives trading with Optiver Australia, and prior to that, in mortgage securitisation with Macquarie Bank, as well as in corporate credit analysis roles with HSBC and Commonwealth Bank. He worked on secondment to Morningstar's London office in 2007. He comments regularly about investing issues in the media.

He has a Bachelor of Applied Finance, Postgraduate Diploma in Accounting, and Master of Applied Finance degrees from Macquarie University, as well as having earnt the right to use the Chartered Financial Analyst and Chartered Alternative Investment Analyst designations. He has completed the Investment Management Workshop at Harvard Business School, is a Fellow of FINSIA, and has been a Masters level guest lecturer on asset management at both Macquarie University and Western Sydney University.

Trent Koch Portfolio Manager, First Sentier Investors

Trent's main responsibilities include managing infrastructure securities on behalf of institutional and wholesale clients and research coverage of the Railroads and Utilities sectors.

Trent has more than 20 years' buy and sell side infrastructure experience, having previously managed infrastructure investments in both the listed and direct space.

Prior to joining the company, Trent was Portfolio Manager for the Challenger Infrastructure Fund, an Australian publicly listed fund that invested in globally diversified unlisted infrastructure assets.

Trent has also held roles at the company in London as a global equities analyst, JP Morgan Cazenove and PricewaterhouseCoopers.

Trent holds an MBA from the Australian Graduate School of Management, is a Chartered Accountant, and has a Bachelor of Commerce from the University of Sydney.

KEYNOTE & HOSTS

AMP CAPITAL · BetaShares Exchange Traded Funds · Ironbark · iShares by BlackRock · PIMCO · Pinnacle · Schroders

PORTFOLIO MANAGER PARTICIPANTS

AMP · BELLMONT SECURITIES · CENTREPOINT ALLIANCE · Context Capital Consulting · First Sentier Investors · INFINITY ASSET MANAGEMENT · investsense · JANA DEPTH WITH DIFFERENCE · Lonsec · MLC ASSET MANAGEMENT · Morgan Stanley · MORNINGSTAR® · ereana.financial Portfolio Advisory · Perpetual

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