

# MULTI-ASSET SEMINAR

## Agenda

Date: Thursday 13 October 2022

Venue: Chartered Accountants' Hall, Moorgate Place,  
London EC2R 6EA

**12.00noon** Registration opens and lunch served

**1.00pm** Welcome and introductions

**1.10pm** General Sir Michael David Jackson

The Russia Ukraine conflict – views from The General

**1.30pm** Andrew Surrey, Active Distribution Lead, Vanguard UK

Vanguard Sustainable Life: Helping advisers rise to the sustainability challenge

It can be a challenge to build sustainability into a client's portfolio whilst also maintaining balance and achieving low cost. Join us to hear why Vanguard works with Wellington, a leader in sustainable investing, and who we have worked with since 1975, to deliver the Vanguard SustainableLife fund range.

**1.50pm** Vivek Paul, FIA, Managing Director and Head of Portfolio Research - BlackRock

Manoeuvring through volatility using Indexing and ETFs: A masterclass in diversification

This year more than ever, diversification in portfolios is key to ensure the best for investor outcomes. In this discussion we will review the current macro environment and the need for diversification across equities, bonds and commodities within multi-asset portfolios. We will also then focus on the benefit of using indexing, and more specifically ETFs within MA portfolios to achieve a flexible portfolio, designed to manoeuvre through these volatile times.

**2.10pm** Speakers:  
- James Klempster, Deputy Head of Multi-Asset - LionTrust  
- Laurentius van den Worm, Investment Specialist - Timeline

Funds or MPS

Host: Ryan Hughes

In this debate our experts will discuss the pros and cons to investing in Multi-Asset Funds vs Managed Portfolio Services. They'll address the key differences, what core strategies they each use, compare the underlying costs, address risk profiles and delve into performance during the current landscape. An insightful session to challenge your current CIP solutions.

**2.40pm** Duncan MacInnes, Investment Director - Ruffer

All Weather Investing For Turbulent Times

Investors are having a tough year. A combination of COVID-induced supply chain disruptions, a shifting labour market and geopolitical events have left an already fragile financial system reeling. Caught between the rock of higher inflation and the hard place of recessionary worries, asset prices have bled lower. The prospect of successfully negotiating a path between swinging interest rate rises and uncontrolled inflation without significant collateral damage has grown less and less likely. How can we get out of this mess?

Duncan MacInnes will share Ruffer's hard won perspective on preserving capital through turbulent markets and periods of regime-change.

**3.00pm** Coffee break

**3.20pm** Hugo Thompson, Investment Specialist - HSBC

Busting Five Myths About UK Biased Multi Asset Portfolios

Over the past 10 years the UK market has been a perennial underperformer, at the start of 2022 it was one of very few equity markets to deliver positive returns, so what does the future look like for the UK, and should your UK based clients have a UK bias within their portfolios.

Join Hugo Thompson, Multi Asset Investment Specialist, as he examines the reasons investors hold UK biases within Multi Asset portfolios and dissects the rationale behind each. Not all is as it seems, investors might be better off holding a more diversified exposure as old adages don't always hold true.

**3.40pm** Justin Onuekwusi, Fund Manager – Legal and General Investment Management

Justin and the beanstalk – tackling the inflation giant

This is not a fairy tale. In the real world, growth and inflation are rising from almost nothing to sky high levels. Justin Onuekwusi will seek to answer the three key questions facing financial advisers:

- What do recent geopolitical risks mean for inflation and our portfolios more broadly?
- Are there any magic beans for advisers when inflation is growing so rapidly?
- If central banks continue to raise interest rates, what does this mean for advisers?

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**4.00pm**      **Speakers:**  
- **Tom Buffham, Portfolio Analyst - Brewin Dolphin**  
- **Ben Popatlal, Multi-Asset Strategist - Schroders**

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### **Responsible Multi-Asset Investing**

**Host: Alena Kosava**

Responsible investing is a growing sector and popular with most households now, creeping into adviser conversations and portfolios frequently. Meeting environmental, social and corporate governance criteria can be a minefield and with a never ending range of to choose from, our experts are here to help. Looking at how their firms tackle responsible investing, target opportunities and manage risk, join us for insight on how to invest for a better future and complement your existing strategy.

**4.30pm**      **Kevin Doran, Managing Director – AJ Bell Investments**

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### **The Summer of Discontent**

Time-travellers from the 1970s arriving in the modern day would be forgiven for wondering if they had ported into the future at all. Industrial disputes, inflation, political instability and divisive proxy wars in foreign lands – a recipe for uncertainty and policy concerns for investors. In this session, Kevin will take a look at the current landscape and provide some portfolio tools to combat the risks faced by politicians in the modern age.

**4.50pm**      **Close**

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**5.00pm**      **Networking drinks**

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