



# AJ BELL MULTI-ASSET SUMMIT

## AGENDA

- 9.30am **Registration**
- 10.00am **Billy Mackay, AJ Bell Marketing Director**  
**Welcome and introductions**
- 10.05am **Kevin Doran, Chief Investment Officer, AJ Bell**  
**Intelligent Investment in the 21st Century**  
As the advent of Big Data and Artificial Intelligence transforms industries across the globe, Kevin takes a critical look at some of the common conventions held by the asset management industry and asks whether they can be updated for a more modern world.
- 10.35am **Dr Richard Whittle, Senior Research Fellow in Political Economy / Behavioural Economics, Manchester Metropolitan University (MMU)**  
**Point of sale disclosure – fit or failing?**  
Richard has been leading a team at MMU looking at whether the current point of sale disclosure regime is fit for purpose. This work explores the influence and appropriateness of the financial documentation on savings and investment decisions. He will be presenting the findings to a parliamentary group in London during April. This session outlines some of his key findings.
- 11.00am **Coffee break**
- 11.20am **Russ Mould, Investment Director, AJ Bell**  
**Market update and the 2018 outlook**  
Investment Director Russ Mould looks at the key economic and market themes that could influence portfolio performance for the remainder of 2018.
- 11.50am **Mark Polson, founder and big boss - the lang cat**  
**Vertically challenged**  
If there's one big industry theme that is guaranteed to set tongues wagging, it's vertical integration (VI). It's fine to sell more than one thing – but who benefits? In this session, Mark will look at the VI world, from platforms turning into asset managers all the way through to fully integrated businesses with large adviser salesforces. VI might be a force for good. Or it might be a way to punt overpriced multi-asset funds to the unwary. This session aims to uncover which of those things is true.
- 12.20pm **Ryan Hughes, Head of Active Portfolios and Matt Brennan, Head of Passive Portfolios, AJ Bell Investments**  
**Active or passive?**  
As the debate between active and passive management continues to rage, we bring together our Heads of Active and Passive Portfolios, Ryan Hughes and Matt Brennan in a head-to-head session to argue the case for both. Two men who are madly passionate about their subject matter - who will land the knockout blow?
- 12.45pm **Lunch**
- 2.00pm **Close**