



AUSTRALIAN
INVESTORS
ASSOCIATION

FINTECH



amazon



DISRUPTION, technological change and the internet of things

5G

Australian Investors Association - National Investment Summit 2018

**We are just at the beginning of the beginning of all kinds of changes...
Is your portfolio ready?**

Building on the early IT revolution of the 1990's and the mobile and smart phone revolution of the 2000's, we are now entering a new inflection point. The combined forces of the acceleration of computing power, data storage, communication networks and digital platforms has all come together in a new force we now know as the 'Internet of Things'.

The world will see more technological acceleration and development in the next five years than we have seen in the last 20.

- * Fintech will disrupt the banking sector
- * Amazon will disrupt the retail sector
- * 5G networks will disrupt the telecommunications sector
- * Solar and batteries will disrupt the energy sector
- * Driverless cars will disrupt the transport sector
- * Disruptors will disrupt disruptors

We are on the brink of an explosion of innovation, catalysed by the junction of cloud computing, mobile connectivity, automation and artificial intelligence, all working in unison.

What does this mean for Australian investors?

SYDNEY
23rd March 2018

1300 555 061
www.investors.asn.au

INVESTMENT SUMMIT

DISRUPTION, technological change and the internet of things HOW TO PROFIT FROM THE CHANGING EMPHASIS

DATE - FRIDAY 23RD MARCH 2018

TIME - 8.30am to 4.30pm

VENUE - SMC Conference & Function Centre, 66 Goulburn St, Sydney

COST - Members & partners: \$139.00, Includes lunch and refreshments
Non-members: \$274.00 Includes 1-year AIA membership,
lunch and refreshments

SPEAKER PAPERS
AVAILABLE BY
DOWNLOAD
PRIOR TO EVENT

OVERVIEW

The starting point will be knowing where your exposures are in your portfolio. The majority of investors have core exposures to banking (ANZ, CBA, NAB & WBC), retail (Wesfarmers and Woolworths), telecommunications (Telstra and TPG) and the energy sectors (Woodside, Santos, AGL and Origin). For many this exposure will make up the majority of your portfolio.

Our 2018 National Summit will be an eye opener on which risks investors need to manage from maintaining old allocations to the pillars of our economy. Who are the disruptors, what are the opportunities and how do investors readjust their portfolios?

INVESTMENT
SUMMIT
2018



Alex Pollak, Founder - Loftus Peak

Alex is CEO, CIO and founder of Loftus Peak.

With 25 years experience in disruptive business models gained during a career with Macquarie Bank, Alex heads one of the best-performing teams in disruptive investment in Australia.

He was instrumental in bringing both Seek and Carsales.com.au to the Australian stock market. His deep knowledge of investment and global change companies means you are ideally placed to benefit financially from the movements in technology which are daily changing the face of markets.



Andrew Jones, Head of Commercial Development - RateSetter

Andrew has over 24 years' experience in financial services. Prior to RateSetter Andrew worked at Challenger, one of Australia's largest investment management companies, where he was Executive Director M&A and Strategy. During his ten years at Challenger, Andrew led numerous projects focusing on disruptive innovation in financial services. Andrew has served on a number of boards in the finance sector. Prior to Challenger Andrew worked at Zurich Capital Markets, Qantas Airways and Baker & McKenzie. He has an honours degree in Law and Commerce.



Nick Griffin, Chief Investment Officer – Munro Partners

Nick is a founding Partner and the Chief Investment Officer of Munro Partners.

Nick is responsible for the investment management of Munro's key investment funds and the formulation and implementation of the proprietary investment process.

Nick has been managing Global Long / Short equity mandates out of Melbourne and Edinburgh for over 10 years.

Nick holds a Bachelor of Commerce (Hons) degree from the University of Melbourne, a Graduate Diploma in Applied Finance and Investment and a Registered Representative of the Sydney Futures Exchange



Tim Koroknay, Investment Specialist - representing Lennox Capital Partners

Lennox Capital is a boutique investment manager specialising in small and micro companies listed on the Australian Stock Exchange. Tim will discuss a number of emerging Australian companies Lennox has identified that are winning from digital disruption and the internet of things. Tim was involved in the creation of the boutique when the Principals transitioned from Macquarie at the beginning of 2017. Prior working with Lennox Capital, Tim was a smaller company analyst at Perpetual Investments.



Charlie Aitken, Chief Investment Officer – AIM

Charlie is founder and fund manager of Aitken Investment Management.

He is the former Managing Director of Bell Potter Wholesale and the author of the daily equity market newsletter Ringing the Bell.

Charlie started his financial markets career in 1993 on the floor of the Sydney Futures Exchange dealing SPI futures for clients of Ord Minnett/Jardine Fleming.

Over his 18 years working in financial markets, Charlie has experienced both bull and bear markets, including the Asian crash, the tech bubble and bust, 9/11, the resources boom, and the global financial crisis. He has met with hundreds of companies and investors all around the world. He has worked in both large and small firms, but has always been focused on the core business of finding undervalued stocks and investing with conviction.

THE PROGRAM

8.30 - 8.55 am	Registration
8.55 - 9.00 am	Opening <i>Russell Lees – AIA Director</i>
9.00 - 9.45 am	Digital disruption and the internet of things <i>Alex Pollak, Founder - Loftus Peak</i> There are a number of powerful reasons investors should pay close attention to the disruptors – one being that they are eating our core companies for lunch. Amazon only offers a picture of a product but is destroying our bricks and mortar stores. Newspapers' rivers of gold have been stolen by Google and Facebook. Banks are up against Google & Apple Pay and Peer to Peer Lenders. Its only a matter of time they are up against disruptors within their core mortgage business.
9.45 - 10.30 am	Taking on the big boys – disruption in the banking sector <i>Andrew Jones, Head of Commercial Development - RateSetter</i> Financial services is the new domain for disruptors. Mobile technology, networked consumers, cloud data and faster micro-chips have smashed the barriers of entry to the Fintech space. Ratesetter is leading the way in Australia for taking market share in personal lending, traditionally the domain of the banks. Andrew will run through their story, the growth opportunities and how investors can use peer to peer lending services to tap into new investment markets.
10.30 - 10.50 am	Morning Tea
10.50 - 11.35 am	Disruption is the main game globally, if you don't play it, you won't survive <i>Nick Griffin, Chief Investment Officer – Munro Partners</i> The investment needed to compete against nimbler and aggressive disruptors is driving a massive drive in global efficiency and has years to play out. Nick will outline the global trends at play and how to capture this for your portfolio.
11.35 - 12.30 pm	Q&A Session We welcome Alex, Andrew & Nick back on stage to take questions from the floor. We'll have two roving microphones.
12.30 - 13.30 pm	Lunch
13.30 - 14.15 pm	Australia is not the US; investing in Australian companies participating in the technological revolution <i>Tim Koroknay, Investment Specialist - Lennox Capital Partners</i> Whilst Facebook has a market cap of US\$530B, Google is US\$728B, in Australia we need to move down to the mid cap space to invest in similar type tech companies. Tim will provide his thoughts on how to achieve this, where Australia is on a global basis, and which disruptors will win.
14.15 - 15.00 pm	Positioning your portfolio for a disruptive economy <i>Charlie Aitken, Chief Investment Officer – AIM</i> As one of Australia's highest profile stock pickers, Charlie will take us through his views on this long term structural changes and what this means for your portfolio. Charlie will outline his stock tips.
15.00 - 15.20 pm	Afternoon Tea
15.20 - 16.20 pm	Q&A Session We welcome Charlie Aitken and Tim Koroknay back on stage to take questions from the floor. We'll have two roving microphones.
16.20 - 16.30 pm	Wrap Up
16.30 pm	<i>Russell Lees, AIA Director</i> Close



THE VENUE

The venue for the Summit is the Banquet Hall at the SMC Conference & Function Centre at 66 Goulburn St Sydney. The SMC building entrance is located at 66 Goulburn Street, near the corner of Castlereagh Street.

GETTING THERE:

BY TRAIN: Museum station is the closest train station. Take the Castlereagh St. exit from Museum station, then turn left heading south down Castlereagh St. At the first intersection (Castlereagh & Goulburn St.) turn right heading west down Goulburn St. 20 metres to the entrance of SMC Conference & Function Centre.

Alternately, a short walk south down Pitt Street from Town Hall Station, then left on Goulburn St.

BY CAR:

PARKING: Car parking is available nearby:

- City of Sydney Secure Parking's Goulburn Street Parking Station
 - Cnr Goulburn & Elizabeth Streets, Sydney NSW 2000 Phone 02 9211 0013
- Entry via Goulburn Street. Cost \$17 per day – entry 6.00am-9.30am; exit 3.00pm-7.00pm
(Rooftop parking - Go to rooftop, have the ticket validated in the morning and park on the roof)
Or, have your ticket validated at the venue for a similar discount.

THE COST

Members & partners: \$139.00 Includes lunch and refreshments

Non-members: \$274.00 Includes 1-year AIA membership, lunch and refreshments

Speak papers provided by download prior to the event.

REGISTRATION

Note that registrations will close at noon, Monday 19th March as the venue requires firm numbers for catering

TO REGISTER - Three Options:-

1. Phone the office on 1300 555 061,
2. AIA members register online
3. Complete the form below

REGISTRATION FORM & TAX INVOICE

Australian Investors Association ABN 75 052 411 999.

You may wish to keep a copy of this tax invoice for your records, as receipts will not be issued.

2018 AIA INVESTMENT SUMMIT - FRIDAY 23RD MARCH 2018

Date: _____

Title: _____ Name: _____ Surname: _____

Partner: _____

Address: _____

Suburb: _____ State: _____ P/Code: _____

Telephone: Primary _____ Mobile _____ Email _____

Are you a member of the AIA? NO YES Member number: _____

How did you hear about this event? _____

Please book _____ places for the Sydney Friday 23rd March 2018 seminar (Price includes GST)

Members & Partners _____ @ \$139 = \$

Non-members _____ @ \$274 = \$ (includes 1 year AIA membership) Total enclosed: \$ _____

Method of payment Cheque Master Card Visa Card

Number _____ / _____ / _____ / _____ Expiry date _____

Name on Card _____ Signature _____

Direct Credit - AIA Members Only - Bank: Bendigo Bank BSB: 633 000 A/C No: 120 632 385 Reference: Surname and Member Number