CENTREPOINT ALLIANCE

Virtual

Investment Solutions Roadshow

Agenda

AWT **9:00 AM** **ACT** **10:30 AM** **AEST** **11:00 AM** **(50 min)**	**Welcome (5 min)** **Risk management & execution in volatile equity markets (45 min)** We discuss a framework for thinking about risk management across every part of the investment process from portfolio design to management and execution on the trading front. At the stock level, we examine the volatility associated with GameStop earlier this year and the importance of a robust implementation process that is nimble and can respond systematically to swift changes in the market. **Speaker: Rob Ness, Dimensional**
	Break (20 min)
AWT **10:10 AM** **ACT** **11:40 AM** **AEST** **12:10 PM** **(45 min)**	**Quality first: Navigating risk in concentrated portfolios** When we purchase direct stocks for our multi-asset strategies, their core purpose is to generate returns. However, investing in individual companies brings idiosyncratic risks, so we need to consider risk in a multi-faceted way. At the stock level, this means we question if the business is of an appropriate quality, and if the price offers us a sufficient margin of safety. At the portfolio level, we ask if the holding is sized to provide a meaningful return without introducing too much stock-specific risk. Join Nick Field, Senior Investment Analyst who will be discussing these considerations, the associated risks and more in this interactive session. **Speaker: Nick Field, Morningstar**
	Lunch (30 min)

AWT **11:25 AM** **ACT** **12:55 PM** **AEST** **1:25 PM** **(45 min)**	**The Inflation Monster: To fear or not to fear?** After a decade of low interest rates and inflation, the global economic rebound from the COVID-19 pandemic has recently seen a lift in inflation expectations. Are fears over rising bond yields and the unshackling of inflation warranted, given the backdrop of unprecedented global policy stimulus and rising input costs? How worried should investors be over the risks to fixed income exposures, and how might the recovery be impacted? In this session, Russell Investments will discuss the implications of rising inflation, including key investment themes and the outlook for the remainder of 2021 – illustrating the importance of an active management approach and robust investment philosophy. **Speaker: Phillip Cheung, Russell Investments**