

# MEET THE MANAGERS

Bringing Investment Professionals Together

## Theme: SAIL AWAY

The final weeks of the 36<sup>th</sup> Americas Cup are analogous to the industry that we work within. Kiwi Magic's first challenge for the Cup in 1986 occurred at a time when financial markets were euphoric about the NZX50 nearing 4,000, and the S&P500 at a lofty 236.

Despite the upsets over the next few years, Black Magic went on to win in 1995 with the NZX50 recovering back to 2,400 and the S&P500 nearing 553. As the wind continued on our shoulders through 2000, Team New Zealand successfully defended the Cup – with the NZX50 passing through 1,900, and the S&P500 at 1,322.

Today the NZX50 is over 13,000 and the S&P500 at 3,860. Will Team New Zealand continue to lead the way, or will the might of the global markets deliver the results once again? This rapid line up of Presenters will discuss the wind shifts ahead for markets, and how to ensure that your client's portfolio is positioned for smooth sailing.

What better way to start the day by listening to Olympic Sailor & Chief Investment Officer for Nanuk - Tom King - draw comparisons between competitive sailing & portfolio management.

With so much content, we look forward to seeing you at one of the venues in March.

**Clayton Coplestone**  
Principal  
Heathcote Investment Partners



## WHEN & WHERE

MONDAY 8<sup>th</sup> MARCH\*  
CROWNE HOTEL  
22a WAGHORNE STREET  
AHUIRI  
NAPIER

TUESDAY 9<sup>th</sup> MARCH  
INTERCONTENTAL HOTEL  
5 GREY STREET  
WELLINGTON

WEDNESDAY 10<sup>th</sup> MARCH  
RYDGES HOTEL  
30 LATIMER SQUARE  
CHRISTCHURCH

THURSDAY 11<sup>th</sup> MARCH  
THE NORTHERN CLUB  
19 PRINCES STREET  
AUCKLAND

FRIDAY 12<sup>th</sup> MARCH\*  
THE TAURANGA CLUB  
LEVEL 5  
DEVONPORT TOWERS  
72 DEVONPORT ROAD  
TAURANGA

COST: No charge

## THE SCHEDULE

Registration desk opens at 8am

Roadshow starts at 8.30am

Morning tea & lunch\* are complimentary

The Roadshow ends at 1.30pm so that you can head off to watch the Americas Cup racing

\*Some venues will comprise a reduced program

## STRUCTURED CREDITS

Full attendance at the conference constitutes 4.5 hours of learning. If it is a learning aim within your 2021 Professional Development Plan, you may decide that this learning constitutes 4.5 Code Structured Hours.

## RSVP

As there are genuine seat restrictions at all the venues, we encourage you to reserve your complimentary place now

Register at: [heathcoteinvestment.com/our-events/](http://heathcoteinvestment.com/our-events/)  
by Friday 26<sup>th</sup> February 2021

For more information, please visit our website  
[www.heathcoteinvestment.com](http://www.heathcoteinvestment.com)

# PRESENTERS

MEET THE MANAGERS – Bringing Investment Professionals Together



**TOM KING**  
Chief Investment  
Officer  
**NANUK ASSET  
MANAGEMENT**



**MARK MITCHELL**  
Portfolio Manager  
**DAINTREE ASSET  
MANAGEMENT**



**MATT REYNOLDS**  
Investment Director  
**CAPITAL GROUP**



**PETE MORRISSEY**  
Head of Real Estate  
Securities & Portfolio  
Manager  
**APN PROPERTY  
GROUP**



**IAN CARMICHAEL**  
Portfolio Manager  
**FAIRLIGHT ASSET  
MANAGEMENT**



**RUSSELL HOGAN**  
Managing Partner  
**DUNDAS GLOBAL  
INVESTORS**



**DEAN ANDERSON**  
Chief Executive Officer  
**KERNEL WEALTH**



**STEPHEN BENNIE**  
Portfolio Manager  
**CASTLE POINT  
FUNDS  
MANAGEMENT**



**JULIAN MORRISON**  
National Key Account  
Manager  
**ALLAN GRAY  
AUSTRALIA**



**JONATHAN WU**  
Executive Director  
**PREMIUM CHINA**



**DANIEL SULLIVAN**  
Portfolio Manager  
**JANUS HENDERSON**



**JOSH WILSON**  
Chief Investment  
Officer  
**CLARITY FUNDS  
MANAGEMENT**



**MATHEW KALEEL**  
Portfolio Manager  
**JANUS HENDERSON**



**MATTHEW  
CLUNIES-ROSS**  
Partner & Chief  
Investment Officer  
**ARTESIAN  
INVESTMENT  
MANAGEMENT**



**JUSTIN LANNEN**  
Portfolio Manager  
**MAPLE-BROWN  
ABBOTT**



**DAN POWELL**  
National Distribution  
Manager  
**NANUK INVESTMENT  
MANAGEMENT**



**ELFREDA  
JONKER**  
Client Portfolio  
Manager  
**ALPHINITY  
INVESTMENT  
MANAGEMENT**



**BEN BRINKERHOFF**  
Head of Adviser  
Services  
**CONSILIUM**

WE LOOK FORWARD TO SEEING YOU AND YOUR COLLEAGUES

*This invitation is open to professional financial intermediaries only who are "wholesale clients" for the purposes of the Financial Advisers Act 2008 (as described in section 5c of the Act)*

We strongly encourage all investment professionals to attend these presentations to hear first-hand the outlook and views from some of the industry's leading investment management entities.

**RSVP NOW** → BY 26<sup>th</sup> February 2021

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