PARAPLANNING Excellence

Thursday, 9 November 2017
Schroders' Offices, 31 Gresham Street, London EC2V 7QA

Paraplanning Excellence is an intense day of relevant investment-focused learning. It provides up to the minute product information; trend data; and case study learning on all aspects of the busy paraplanner's role. This packed day has been put together in association with **Invesco Perpetual** and **Schroders**, two of the most substantial asset managers in the country.

PROGRAMME					
08.45-09.15	Welcome, registration coffee and buns				
09.15-09.25	**Welcome from Invesco Perpetual and Schroders**				
09.25-09.50	**Opening address:** *Neal Bailey, Invesco Perpetual*				
09.50-10.20	**Lecture 1: Artificial Intelligence: just how safe is your job?** *Driverless cars, Amazon Go, the robostore - you shop but you don't check out you just walk out – it's all done for you; Sam the brickie (Semi Automated Mason). Apparently there is also KashFlow, Rocket Lawyer and SimpleTax. All a bit "Terminator" – but according to John Hawksworth, chief economist at PwC, he estimates that almost a third of existing UK jobs may be automated away over the next 15 years. So you had better start paying attention!*				
10.20-11.00 Industry Workshops	**AUDITORIUM**	**G.01**	**G.03**	**G.09**	**G.10**
	The changing face of investment platforms - As the FCA undertakes the Investment Platforms Market Study, it might be a good idea to take some time to address the role of platforms in the value chain.	**The General Data Protection Regulation (GDPR) -** This regulation marks a significant step up in data protection requirements with many firms not yet appreciating the significant impact it will have on their operating models.	**Are there tools which you feel you need to increase your Productivity? -** With margins being squeezed, it is not surprising that CEOs seek to get the most out of their teams.	**Open Banking – is your firm ahead of the curve?** It will provide major opportunities to reduce costs and improve efficiency. Your clients will authorise you to access data from the AISPs and this knowledge combined with the data provided by the Pensions Dashboard will give you a holistic view of their financial affairs – indeed and more! It will greatly enhance fact-finding, and future needs analysis will be modelled with greater accuracy. Better get ready.	**Innovation -** It has been suggested that maybe the word innovation itself should be ditched and that the real discussion should be more about what you are trying to achieve e.g. excellence, differentiation, delight or transformation. Google encourage their people to strive but equally give them permission to fail. So is your leadership an innovation leadership? If not – and to be honest we suspect the answer will be mostly no – what would you like to see happen to make your organisation encourage you to let rip!
11.00-11.20	**Coffee – Networking**				
11.20-11.55 Investment Briefings	**Asian Equities** - William Lam, Asian Equities Fund Manager & John Pellegry, Asian Equities Product Director- Invesco Perpetual	**Outlook for Global Equities** - John Botham, Global Equities Product Director- Invesco Perpetual.	**Introduction to Enhanced Index Funds** - Georg Elsaesser, Invesco Quantitative Strategies Senior Portfolio Manager- Invesco Perpetual.	**European equities** - James Rutland, Research Analyst, European Equities, Schroders.	**Global cities** - Hugo Machin, Co-head Global Property Securities & Tom Walker, Co-Head Global Property Securities, Schroders.
11.55-12.30 Investment Briefings	**Fixed Income - High yield** - Mike Scott, Credit Fund Manager– Schroders	**Outlook for Global Equities** - John Botham, Global Equities Product Director- Invesco Perpetual.	**Introduction to Enhanced Index Funds** - Georg Elsaesser, Invesco Quantitative Strategies Senior Portfolio Manager- Invesco Perpetual.	**European equities** - James Rutland, Research Analyst, European Equities, Schroders.	**Global cities** - Hugo Machin, Co-head Global Property Securities & Tom Walker, Co-Head Global Property Securities, Schroders.
12.30-13.15	*Lunch – an opportunity to network*				
13.15-13.45	**Lecture 2: The stand out client experience -** We will field an expert who will provide you with some of these top tips for pressing the right buttons or not!				

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15.35-16.00	**Closing Address:** Markets and Macro, Senior Representative, Schroders				

INVESTMENT BRIEFING

Capturing opportunities in Asia - William Lam, Asian Equities Fund Manager & John Pellegry, Asian Equities Product Director- Invesco Perpetual..
Overview of William's approach to investing, investment principles and process. Focusing on areas providing the greatest opportunities in Asia, latest market views, and how this is affecting current fund positioning.

Outlook for Global Equities - Outlook for Global Equities - John Botham, Global Equities Product Director- Invesco Perpetual.
Our view on the outlook for Global Equities, where we see the best opportunities and how we aim to capitalise on them.

European equities - James Rutland, Research Analyst, European Equities, Schroders.
An avid advocate of an active approach to investing In European equities, James Rutland will discuss why, after several years as an enthusiastic bull, he is now more circumspect about the asset class. This is not because he thinks the European economy is not doing well but because the consensus has turned from bearish to bullish, pushing valuations up to levels which in absolute terms are on the expensive side. He will outline why he believes that Europe is now likely to see a rise in inflation and explain why portfolios that have been positioned for the prevalent conditions of the past ten years will need to be significantly adjusted for this environment. He will then give his views on the areas of the market that currently provide the best opportunities to add value and equally importantly in the current climate, areas that are overvalued and are best avoided.

Global cities - Hugo Machin, Co-head Global Property Securities & Tom Walker, Co-Head Global Property Securities, Schroders.
By 2030 UN forecasts a population of 8.5 billion and that 75% of us will live in cities. However, not all cities are equal. Cities around the globe will fight for our attention and investment, but only a select few will have the infrastructure to cope with demand and prosper. Those that do will become global cities.
Today, cities are arguably more important than countries. The economic power of certain cities, such as London, far outstrips those of the countries they are in.

Introduction to Enhanced Index Funds - Georg Elsaesser, Invesco Quantitative Strategies Senior Portfolio Manager- Invesco Perpetual.

To understand factor investing, how fund houses can add value through factor investing and how factor based investing can deliver on Enhanced Index goals