

**Wednesday, 8 November 2017**  
**Aspire, 2 Infirmary St, Leeds LS1 2JP**

Paraplanning Excellence is an intense day of relevant investment-focused learning for paraplanners who want to get ahead. 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.

Please see below for the full synopsis.

PROGRAMME				
<b>08.45-09.15</b>	Welcome, registration coffee and bun			
<b>09.15-09.20</b>	<b>Welcome from Invesco Perpetual and Schroders</b>			
<b>09.20-09.50</b>	<b>Opening address:</b> Neal Bailey, Invesco Perpetual			
<b>09.50-10.35</b> <b>Big data – work it!</b> – All organisations have access to valuable data, but either fail to capture data, fail to understand what data is relevant and fail to use data effectively. Businesses struggle to get demonstrable value from data. Identification and prioritisation of only the most relevant data can be the first step to unlocking data paralysis				
<b>10.35-11.15</b> <b>Industry Workshops</b>	What does the perfect platform look like and how do we get there to ensure transparency and greater customer outcomes?	What does a great customer experience look like and how do you build it?	The session with the most acronyms! Let's talk MiFID II, FAMR, GDPR, Asset Management Market Study and much more.	Management wants us to be productive, we want to be productive – so what is holding us back?
<b>11.15-11.35</b>	Coffee – Networking			
<b>11.35-12.15</b> <b>Investment Briefings</b>	<b>Capturing opportunities in Asia</b> William Lam, Asian Equities Fund Manager & John Pellegrini, Asian Equities Product Director- Invesco Perpetual..	<b>Outlook for Global Equities</b> - John Botham, Global Equities Product Director- Invesco Perpetual.	<b>European equities</b> - James Rutland, Research Analyst, European Equities, Schroders.	<b>Global cities</b> - Stuart Podmore, Investment Propositions Director at Schroders.
<b>12.15-12.55</b> <b>Investment Briefings</b>	<b>Capturing opportunities in Asia</b> William Lam, Asian Equities Fund Manager & John Pellegrini, Asian Equities Product Director- Invesco Perpetual.	<b>Outlook for Global Equities</b> - John Botham, Global Equities Product Director- Invesco Perpetual	<b>European equities</b> - James Rutland, Research Analyst, European Equities, Schroders	<b>Global cities</b> - Stuart Podmore, Investment Propositions Director at Schroders

12.55-13.40	Lunch – an opportunity to network			
13.40-14.15	<b>Life, work and death</b> – the good and the bad news of living longer. This session explores changing trends in lifespan and lifestyle, offering plenty of food for thought on the challenges that lie ahead for the pensions industry			
<b>14.15-14.55 Industry Workshops</b>	What does the perfect platform look like and how do we get there to ensure transparency and greater customer outcomes?	What does a great customer experience look like and how do you build it?	The session with the most acronyms! Let's talk MIFID II, FAMR, GDPR, Asset Management Review and much more.	Management wants us to be productive, we want to be productive – so what is holding us back?
14.55-15.25	<b>Closing Address: Behavioural Finance- The psychology of value and how to inflation proof your portfolio.</b> Stuart Podmore, Schroders			
15.25-15.30	<b>Thank you from Invesco Perpetual and Schroders</b>			
15.30	<b>A farewell cuppa!</b>			

## INVESTMENT BRIEFING

### **Capturing opportunities in Asia - William Lam, Asian Equities Fund Manager & John Pellegrini, 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 - 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 - Stuart Podmore, Investment Propositions Director – 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.