



**HD Morningstar Australasia Announces Keynote, Agenda for Eighth Annual Investment Conference**

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SYDNEY, - Morningstar Australasia Pty Limited, a subsidiary of Morningstar, Inc. (NASDAQ: MORN), is holding its eighth annual Investment Conference for Australian financial advisers and brokers on Thursday 15 May 2014 at The Westin Hotel Sydney.

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'We're pleased to bring together another first-rate line-up of speakers and panel discussions,' Morningstar Australasia Co-Head of Fund Research Tim Murphy said. 'The theme of this year's event, 'Investing on the Front Foot', is about equipping financial advisers and brokers with expert knowledge, insights, and resources they can take away and use in effective portfolio management and client engagement.'

This year's keynote is Ian Macfarlane, AC. Mr Macfarlane will discuss the role of central banks in the local and global economies, Australia's relationships with **China** and the emerging world, and his views on the forthcoming Financial Services Inquiry in a conversation with Andrew Lill, Chief Investment Officer, Asia-Pacific for Ibbotson Associates Australia, a Morningstar **company**.

Mr Macfarlane was Governor of the Reserve Bank of Australia from 1996 to 2006. In 2002, he was chosen as Central Bank Governor of the Year by Euromoney magazine. Mr Macfarlane joined the Reserve Bank of Australia in 1979 and held a number of senior positions before becoming Governor. He also worked for the Organisation for Economic Cooperation and Development in Paris for six years, and before that for the Institute for Economics and Statistics at Oxford University. He was educated at Monash University in Australia and has been awarded honorary doctorates from Sydney, Melbourne, Macquarie, New South Wales, and Monash Universities. He was elected a Fellow of the Academy of Social Sciences, and made a Companion of the Order of Australia in 2003. Since leaving the Reserve Bank, Mr Macfarlane has held directorships in three public companies: the Australia and New Zealand Banking Group, Woolworths, and Leighton Holdings. He is on the International Advisory Board of Goldman Sachs, the **China** Bank Regulatory Commission, and CHAMP Private **Equity**, and has been a director of the Lowy Institute for International Policy since its inception in 2004.

Prominent speakers will include New York City-based Nicholas Bratt, Managing Director and Portfolio Manager/Analyst, Lazard Asset Management, LLC; London-based John Beck, Senior Vice-President and Co-Director, Global Fixed Income, Franklin Templeton Fixed Income Group; and Palm Beach, Fla.-based Sean McGould, President and Co-Chief Investment Officer, Lighthouse Investment Partners, LLP.

Rob Coombe, Chief Executive Officer, QSRH Limited and former Group Executive, Westpac Retail and Business Banking and Chief Executive, BT Financial Group, will shine a light on the financial services industry today from the perspective of his wide-ranging career, in a conversation with Morningstar Managing Director of Research Strategy, Asia-Pacific Anthony Serhan.

Attendees will be able to select from two streams that address major issues in managed fund investing and direct investing. Panel discussions will feature the following portfolio managers and investment industry thought leaders:

Asset Allocation - Michael Karagianis, Senior Investment Strategist at MLC Investment Management;

Brad Bugg, Head of Fixed Income and Currency at Ibbotson Associates Australia; and Simon Stevenson, Head

of Strategy at Schroder Investment Management Australia, will discuss the big picture outlook for major asset classes, asset allocation, and portfolio positioning in a session moderated by Morningstar Australasia Co-Head of Fund Research Chris Douglas.

#### Fund Investing Stream

Fixed Interest - John Beck, Senior Vice-President, Franklin Templeton Fixed Income Group, and

Robert Mead, Managing Director, Head of Portfolio Management and Asia-Pacific Credit Portfolio Management, PIMCO, will discuss key issues in fixed interest investing in a session moderated by Morningstar Fund Research Analyst Kathryn Young.

Australian Equities - Crispin Murray, Head of **Equity** Strategies, BT Investment Management, and Matthew Williams, Head of Equities and Senior Portfolio Manager, Perpetual Investments, will discuss the outlook for investing in the Australian sharemarket in a session chaired by Morningstar Research Manager Tom Whitelaw.

Global Equities - Nicholas Bratt, Managing Director and Portfolio Manager/Analyst, Lazard Asset Management, LLC, and Chris Mackay, Portfolio Manager, Magellan Flagship Fund, will discuss the prospects for world sharemarkets in a session chaired by Morningstar Australasia's Co-Head of Fund Research Chris Douglas.

Alternatives - Sean McGould, President and Co-Chief Investment Officer, Lighthouse Investment Partners, LLP and Michael Coop, Head of Alternatives and Capital Markets, Ibbotson Associates Australia, will discuss the role of alternative investments in portfolios in a session chaired by Morningstar Senior Research Analyst Julian Robertson.

#### Direct Investing Stream

Building High-Quality Direct **Equity** Portfolios - Joel Bloomer, Morningstar Head of Asia-Pacific **Equity** and Credit Research; Mathew Hodge, Morningstar Australasia Sector Head for Basic Materials, **Energy**, and Utilities; and Peter Warnes, Morningstar Australasia Head of **Equity** Research, will discuss best practices in building approved product lists and direct **equity** portfolios, including ways to identify quality companies, discover intrinsic value, and manage risk.

Income Investing Using Exchange-Traded Funds - Morningstar Australasia Co-Head of Fund Research Tim Murphy will explore current trends in exchange-traded fund (ETF) usage, including income-focused **equity** and fixed interest ETFs, in light of the hunger for income prompted by the ageing demographic and the growth of self-managed superannuation funds.

The Rise and Rise of Interest Rate Securities - Morningstar Australasia Credit Analyst Nicholas Yaxley will analyse the key drivers of issuance, explore how to use interest rate securities in the asset allocation framework, and discuss what's being done by market stakeholders to develop a fully-functioning retail bond market.

Portfolio Construction - Morningstar Australasia's Douglas and Murphy, along with Ibbotson Associates Australia Managing Director Chris Galloway, will summarise the major themes and issues raised during the day's discussion and identify the principal takeaways for portfolio construction and management in the year ahead in a session moderated by Morningstar Head of Fund Research, Asia-Pacific Grant Kennaway.

#### Attendee Registration

More information including the full agenda, attendee registration, and continuing education credits is available at [www.morningstarinvestmentconference.com.au](http://www.morningstarinvestmentconference.com.au).

#### Media Registration

Media representatives may receive complimentary registration. If you are a member of the media and would like to register, please contact Phillip Gray at +61 2 9276 4456 or [phillip.gray@morningstar.com](mailto:phillip.gray@morningstar.com).

#### Continuing Professional Development Points

Attendees will be eligible to apply for Financial Planning Association-accredited Continuing Professional Development (CPD) points. Attendees for the 2013 conference received 6.75 points.

About Morningstar Australasia Pty Limited and Morningstar, Inc.

Morningstar Australasia Pty Limited is a subsidiary of Morningstar, Inc., a leading provider of independent investment research in North America, Europe, Australasia, and Asia. The **company** offers an extensive line of products and services for individual investors, financial advisers, asset managers, and retirement plan providers and sponsors. Morningstar provides data on approximately 446,000 investment offerings, including stocks, mutual funds, and similar vehicles, along with real-time global market data on more than 10 **million** equities, indexes, futures, options, commodities, and precious metals, in addition to foreign exchange and Treasury markets. Morningstar also offers investment management services through its registered investment adviser subsidiaries and had approximately US\$159.0 **billion** in assets under advisement and management at 31 December 2013. The **company** has **operations** in 27 countries.

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