AGENDA

12.00pm  Registration and Lunch
12:45pm  Opening Statement  - Louis Christopher  | SQM Research
1:05pm   Economic Outlook  - Peter Switzer  | The Switzer Group
1:45pm   Mortgage Trusts:
          Non-bank financial Institutions are having a field day! The banks are rejecting quality lending
          opportunities and default rates are near all-time lows. Have the banks got it right, long term?
          Speakers:  Michael Holm  | Balmain NB Corporation Ltd
                      Michael Watson  | La Trobe Financial
2:30pm   Global Property Securities versus A-REITS
          Finally, 2017 was the year where Global REITS outperformed Australian REITS by aconsiderable
          margin. What caused this outperformance and is this set to continue?
          Speakers:  Michael Doble  | APN Property Group
                      Marco Colantonio  | Resolution Capital
3:05pm   Afternoon Tea Break
3:25pm   Infrastructure
          Infrastructure stocks have had a fantastic run over the past eight years. It has meant that
          yields are very low. Is the sector susceptible to a downturn should interest rates rise?
          Speakers:  Gerald Stack  | Magellan Financial Group
                      Andrew Maple-Brown  | Maple-Brown Abbott
4:00pm   Direct Property
          Have commercial property yields bottomed out and are commercial property development
          investors being adequately rewarded for the risks they are taking on?
          Speaker:  Trevor Loewensohn  | Alceon
4:33pm   Residential Property Outlook  - Louis Christopher  | SQM Research
          APRA, Negative Gearing repeal and rising interest rates - there are some serious headwinds for
          home buyers to consider. Are these big enough triggers for the long anticipated housing crash?
5:15pm   Closing Statement
5:30pm   Canapes and Drinks
6:30pm   Event Concludes

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