



London Value Investor Conference 14th May 2019

7.30-8.30	Registration and Breakfast
Morning Session – Moderated by David Shapiro	
8.30-8.45	David Shapiro – Willis Towers Watson <i>Opening Remarks</i>
8.45-9.15	Jonathan Ruffer – Ruffer LLP <i>Is Value a Trap-Door?</i>
9.15-9.45	C.T. Fitzpatrick – Vulcan Value Partners <i>The Tension Between Time Horizon and Disruption and the Importance of Humility</i>
9.45-10.15	Nick Purves and Ian Lance – RWC Partners <i>Value Investing in the Age of Disruption: the Importance of Being Selective</i>
10.15-10.35	Ben Preston – Orbis Investments <i>Asymmetric Investing: Stacking the Odds in Your Favour</i>
10.35-11.05	Coffee and networking break
11.05-11.35	David Harding – Winton <i>Where Are The Value Investors' Yachts?</i>
11.35-12.05	Alex Roepers – Atlantic Investment Management <i>Atlantic's Approach to Value Investing</i>
12.05-12.35	Robert Hagstrom – EquityCompass Strategies <i>How To Become A Self-Transforming Investor: Closing the Gap on an Increasingly Complex Financial World</i>
12.35-1.05	Martin Walker – Invesco <i>The Virtues of Value Investing</i>
1.05-2.00	Lunch
Afternoon session: Moderated by Richard Oldfield	
2.00-2.30	Matthew McLennan – First Eagle Investment Management <i>The Value of Scarcity</i>
2.30-3.00	Ronald Chan – Chartwell Capital <i>Finding a Spark in Japan</i>
3.00-3.30	Alex Wright – Fidelity International <i>Don't Wait for Good News to Buy UK Companies</i>
3.30-4.00	Rajiv Jain – GQG Partners <i>Is There Really Anything Like a Value / Growth Cycle?</i>
4.00-4.30	Tea and networking break
4.30-4.50	Mark Pearson – Arcus Investment <i>Tokyo 89ers: Digging for Value in the Japanese Equity Market</i>
4.50-5.10	Jennifer Wallace – Summit Street Capital Management <i>It Ain't What You Don't Know That Gets You Into Trouble</i>
5.10-5.30	Andrew Hollingworth – Holland Advisors <i>Leicester City 3 – Man United 1</i>
5.30-6.15	Sir Martin Sorrell, S ⁴ Capital and Robert Hagstrom, EquityCompass Strategies <i>Fireside Chat and Audience Q&A: The New Marketing Realty</i>
6.15-7.30	Drinks reception