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FINANCIAL NEWS



Investing in ETFs

12th May 2009

Skinner's Hall, London

The 2009 Investing in ETFs conference will explore the most pressing issues concerning this important asset class. Find out where the industry is headed and which trends and new products are most promising in this ever changing market.

"The ETF-Conference was extremely interesting and provided me with an extraordinary insight into the construction of ETFs and the best use of ETFs in an efficient portfolio. Possibilities to network were an additional advantage of that conference. I got the chance to talk face-to-face with the best ETF specialists of Europe."

Anton Altendorfer, Redakteur, Institutional Money (Investing in ETF's 2008, Frankfurt)

Top industry speakers include:

Deborah Fuhr, Global Head of ETF Research and Implementation Strategy, **Barclays Global Investors**

Jim Wiandt, Publisher, **Index Publications**

Jim Kandunias, CFA, COO, **Legg Mason International Equities**

John Redwood, Chairman, **Evercore Pan-Asset Capital Management Limited**

Elizabeth Stone, Partner, Tax, **PricewaterhouseCoopers**

Tim Mitchell, Head of Investing Institution, **Invesco - PowerShares**

Karl Olbert, Senior Consultant, **Funds@Work**

Tom Lydon, Editor, **ETF Trends**

Jacob H. Schmidt, CEO, **Schmidt Research Partners Ltd.**

Hartmut Graf, Director, Head of Issuer Data & Analytics, **Deutsche Börse**

David Bennett, CEO, **Association of Private Clients & Stockbrokers**

Penny Shepherd, CEO, **UKSIF (UK Social Investment Forum)**

Simon Gleeson, Partner, **Clifford Chance**

James Mawson, Editor, **Private Equity News**

John Godden, CEO, **IGS Hedge Fund Advisory**

Giles Crewdson, Head of Asset Management Practice, **Korn Ferry**

Markus Hill, Independent Asset Management Consultant

Paolo Giulianini, Head of ETF Trading & Advisory, **UniCredit HVB**

The conference will give you insight into how to:

- Become a better investor and choose the right type of ETF
- Generate Alpha in an era of limited resources and economic downturn
- Identify new and most promising ETF products and trends
- Avoid the tax-trap and maximize the traditional tax efficiency of ETFs
- Manage, protect and keep your money in good hands
- Determine the most effective investment strategies and achieve sufficient diversification
- Find the right trade-off between fees and product specialism

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Investing in ETFs

12th May 2009
Skinner's Hall, London

Tuesday, 12th May 2009

08.30 Registration and Coffee



09.00 Chairman's Opening Address
James Mawson, Editor, **Private Equity News**

09.05 Keynote: ETFs in changing times

- Industry outlook for the next 5 years
- Defining the most crucial challenges ahead
- How to generate maximum Alpha with limited resources
- How to manage the challenges of the credit crunch and changing spending patterns

Deborah Fuhr, Global Head of ETF Research and Implementation Strategy, **Barclays Global Investors**

09.30 New products and trends – where is the market headed?

- Top three products – according to the amount of allocated assets
- Investor's advice in changing times – how to measure effectively product transparency
- Defining and measuring investor interest through growing market exposure and tax efficiency
- Fundraising trail and special client binding measures

Moderator: **John Redwood**, Chairman, **Evercore Pan-Asset Capital Management**

Jim Wiandt, Publisher, **Index Publications**

Karl Olbert, Senior Consultant, **Funds@Work**

Simon Gleeson, Partner, **Clifford Chance**

10.10 Morning Coffee and Networking Break



10.40 Who manages your money?

- The importance of knowing who manages your investment
- How to keep your money in good hands - identifying the right Asset Management firm
- From an investors point of view - Defining the overall importance of talent retention within Asset Management companies
- Protect your money - How to securely identify problems before its too late
- What are the appropriate counter-measures when things do go wrong

Moderator: **Markus Hill**, Independent Asset Management Consultant

Jim Kandunias, CFA, COO, **Legg Mason International Equities**

Giles Crewson, Head of Asset Management Practice, **Korn Ferry**

11.20 Socially and responsible European investing in ETFs

- Which influence does the green finance industry with its estimated 2.6 Trillion Euros under management exceed upon the ETF development?
- Defining the beauty of green and ethical - are ETFs the right Asset class for conscious and value driven investors?
- What are green investors looking for when choosing their ETFs?
- Which are currently the most important products on the market and is there any significant role being played by Islamic Finance in this Asset class?
- Considering the instrument of microfinance for ETF investments – valuable portfolio addition or financial Fata Morgana with no real value?

Penny Shepherd, CEO, **UKSIF (UK Social Investment Forum)**

11.45 IML Polling session: The 2009 ETF Investors Survey

- Trends, topics and people - instant audience results

12.15

Networking Lunch

Kindly sponsored by

The Pulse of Finance



13.25

What should investors be looking for when choosing the right ETF?

- What are investors looking at when choosing the right ETF for them?
- Defining a successful pre - investment checklist
- Where to find the right Asset Management firm for your specific needs
- How to avoid pitfalls and make your investment a success

Moderator: **David Bennett**, CEO, **Association of Private Clients & Stockbrokers**

Paolo Julianini, Head of ETF Trading & Advisory, **UniCredit HVB**

14.05

Fundamental weighted indices

- Do share prices fairly represent the fair value of companies?
- Are fundamentally weighted indices just a value play?
- In what markets or sectors do they work best?

Tim Mitchell, Head of Investing Institution, **Invesco – PowerShares**

14:30

How to find the right Index

- Defining the quality of different indices used by ETFs
- Does unknown territory automatically refer to a lack of quality?
- How to test new indices effectively without loosing money
- What are the prime index quality criteria for ETFs?
- Is there a tendency for newer ETFs to list with unknown indices?
- How to avoid the pitfalls of betting on the wrong horse

Hartmut Graf, Director, Head of Issuer Data & Analytics,

Deutsche Börse

15:10

Coffee and Networking Break

15:45

Challenging common misunderstandings about ETFs

- Rightly managed, why is short term speculation actually a gain for markets, shareholders and investors?
- How to successfully explain growing trading expenses to small portfolio investors with huge product choice?
- The evils of insufficient diversification – overestimated by the media? How to establish a healthy portfolio
- Defining the dependence on arbitrage mechanisms
- What are the key advantages over index funds?
- Making money against the trend – how to out-manoeuvre the credit crunch

Moderator: **James Mawson**, Editor, **Private Equity News**

John Godden, CEO, **IGS Hedge Fund Advisory**

Jacob H. Schmidt, CEO, **Schmidt Research Partners Ltd**

Tom Lydon, Editor, **ETF Trends**

16:25

How to avoid the tax-trap – legislation on the move

- How to maximize the traditional tax efficiency of ETFs
- Maximum returns - What are the key advantages of the UK taxation system when comparing to its global competitors
- Defining the change in UK tax legislation over the last five years and to which extent has it leveled the playing field
- Possible areas of further change in legislation

Moderator: **James Mawson**, Editor, **Private Equity News**

Elizabeth Stone, Partner, Tax, **PricewaterhouseCoopers**

16.55

Chairman's Closing Remarks

17:10 – 18:30 Networking Drinks Reception

Register Now: Tel: +44 (0) 20 7426 3345
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Investing in ETFs

12th May 2009
Skinners' Hall, London

Who should attend:

- Portfolio Managers
- Investment Managers / Private Wealth Managers
- Trustees
- Analysts
- Managing Directors
- Heads of Investment
- Chairmen / CIOs / Presidents
- Client Relationship Managers
- Head of Business Development / Institutional Clients
- Head of ETF / Structured Products / Index Products / Equities
- Traders
- Fund Advisors

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- Index Providers
- Rating Agencies
- ETF Providers
- Investment and Private Banks
- HNWIs and Family Offices

ETFs have become increasingly popular in recent years, with predictions of rapid growth over the next few years. As an attractive asset class to both retail and institutional investors, ETFs provide unique benefits such as lower expense ratios, tax efficiency, and portfolio diversification.

A panel of experts has been put together for the **Dow Jones / Financial News 3rd "Investing in ETFs"** conference in London to share their knowledge of successful investing in ETFs. This highly interactive forum will bring together the industry leaders to discuss the best investment opportunities in the ETF market. Don't miss this unique chance to learn about winning asset allocation strategies and network with a high quality audience.

"Certainly an event with stimulating interaction between speakers and delegates; serious thought provoking debate, very good content - excellent!"

Markus Hill, Managing Director, MH SERVICES and Independent Management Consultant

Do not miss this event if you want to:

- Meet industry representatives to discuss the hottest issues affecting the ETF industry
- Explore how best to implement ETFs in your investment portfolio
- Find out how to choose the right type of ETF
- Network with a relevant audience

Silver Sponsor:



The Markets & Investment Banking division of UniCredit Group has a long established history in the domain of ETF market making and advisory. Since 2000 the successful ETF team is the European pioneer in the ETF market, consistently achieving numerous top ratings. In the yearly survey of Deutsche Risk, UniCredit Group through HVB has been awarded #1 Market Maker for ETFs in 2004, 2005, 2006, 2007 and 2008. Furthermore, it is also the leader in the Italian portfolio insurance market and in the Italian OTC interest rate and equity derivatives market.

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ADMINISTRATION DETAILS

Investing in ETF's 2009

Date: 12th May 2009

Time: 08:30 - 17:00

Venue: Skinners' Hall, London

Address: 8 Dowgate Hill

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