

# Morningstar Investment Conference Agenda

## October 4 and 5, 2011 | The Westin Harbour Castle Hotel, Toronto

Day 1	Time and Session	Speakers
	13:00–16:00	
	<p><b>Introduction to Morningstar</b>  <b>Workshop: ETF 101 and 301</b>  <b>The Practitioner’s Guide to ETF Investing</b></p> <p>The Morningstar ETF research team will guide you through an introduction to ETFs, how to build a portfolio with ETFs, what pitfalls to avoid, and the strategies Morningstar has developed to use them as powerful investing tools.</p>	<p>Michael Rawson            John Gabriel            Paul Justice            Morningstar Inc.</p>
	16:30–17:30	
	<p><b>Opening Keynote Session: The State of the Industry</b></p> <p>Innovation and advances in technology have led to an explosion of new financial products and services. James Norris, Managing Director of Vanguard International, will discuss those changes and the state of the investment industry today. Vanguard’s global reach, breadth of investment products, size, and recent foray into Canada put James in a position to provide a unique view of the global investment fund landscape.</p>	<p>James M. Norris,            Vanguard International</p>
Day 2	Time and Session	Speakers
	7:45–8:30	
	<b>Registration and Breakfast</b>	
	8:30–8:35	
	<b>Opening Remarks</b>	<p>Scott Mackenzie,            Morningstar Canada</p>
	8:35–9:30	
	<p><b>ETF Executive Panel</b></p> <p>This panel will discuss the current ETF landscape, opportunities and challenges, and the continuing evolution of ETFs in investors’ portfolios.</p>	<p>Howard J. Atkinson,            Horizons Exchange Traded Funds Inc.            Mary Anne Wiley,            BlackRock Asset Management Canada Ltd.            Kevin Gopaul,            BMO Financial Group            Som Seif,            Claymore Investments Inc.</p>

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Day 2	Time and Session	Speakers
	9:30–10:15	
	<p><b>RAFI Strategies: Five Years Later</b></p> <p>Five years and 5 stars later, the Research Affiliates Fundamental Index strategy has delivered remarkable performance. Join us as pioneer Robert Arnott discusses the source of the outperformance and where else we can expect the strategy to work.</p>	<p>Robert D. Arnott, Research Affiliates LLC</p>
	10:15–10:40	
	<b>Break</b>	
	10:40–11:25	
	<p><b>Stock Selection Panel</b></p> <p>Viewed in isolation, lists of stocks that portfolio managers are buying or selling aren't that meaningful. Instead, they should be viewed in the context of the manager's investment discipline. Representing contrasting investment styles and strategies, three veteran managers will discuss specific picks that exemplify their approaches to managing money, along with names that fail to meet their criteria. Find out the assumptions behind the managers' picks, and why someone's favoured pick may be another manager's discard.</p>	<p>Jim Hall, Mawer Investment Management</p>
	11:25–12:10	
	<p><b>Assessing the Price of Gold</b></p> <p>This session addresses the burning question every investor is asking and how to go about finding that true value from a fundamental, relative, and perception basis.</p>	<p>Christopher J. Goolgasian, State Street Global Advisors</p>
	12:10–12:55	
	<b>Lunch Buffet</b>	
	12:55–13:40	
	<p><b>Income Focus: Where is the Yield?</b></p> <p>In a zero-interest-rate world, investors are scrambling for new sources of income. This presentation takes a look at ways investors can capture yield in a low interest rate environment.</p>	<p>Daniel S. Janis, Manulife Asset Management (U.S.) LLC</p>

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	13:40–14:25	
	<p><b>Best Practices in Trade Execution</b></p> <p>A good investment idea can be all for not with a bad execution plan. We bring one of the foremost experts on ETF trading to share best practices for trading ETFs. In addition to helping attendees better understand true ETF liquidity, there will also be live demonstrations of large block trades during the session.</p>	<p>Andrew McOrmond, WallachBeth Capital LLC</p>
	14:25–14:50	
	<b>Break</b>	
	14:50–16:20	
	<p><b>Macroeconomic Panel</b></p> <p>A panel of economists and fund managers will discuss their outlook for the global economy and share their thoughts on the latest developments in equity and fixed income markets. What are the biggest risks to global growth? How quickly and meaningfully are interest rates likely to rise? What's in store for the Canadian dollar? Which market sectors look promising? These and many more questions are up for debate.</p>	<p>Eric Lascelles, RBC Global Asset Management Inc. Jurrien Timmer, Fidelity Investments</p>
	16:20–16:25	
	<b>Closing Remarks</b>	