



Society of Actuaries in Ireland

Current trends in Investment
A cutting edge update from market experts

4.30-6.30pm, Wednesday 5th November 2014
Chartered Accountants House

Who should attend: This is open both to those who work in financial markets and others who are impacted by these markets (i.e. all members). The event is also open to interested non-members.

Agenda

4.00pm **Registration + tea/coffee**

4.30pm **Introduction** Shane O'Farrell, Chair of the SAI Finance & Investment Committee

4.35pm **Hot topics & current trends in Investment:**

Smart Beta Strategies Ana Harris, SSGA **(20mins)**

Smart Beta strategies aim to offer diversification and 'better' return per unit of risk. This session will explore how this might be achieved.

Alternative asset classes Blair Reid, Bluebay **(20mins)**

The universe of alternative credit includes senior secure loans, high yield debt, asset backed securities and emerging market debt. This session will explore the current appeal of these strategies.

Economic, Social & Corporate Governance (ESG) Sandra Rockett, ILIM **(20mins)**

What is ESG and why is it topical now? This session will also explore what ESG involves and the future developments likely in this area.

5.35pm **The Irish domestic property market & consequences for the Irish economy**

Ronan Lyons, Asst. Professor of Economics, TCD

6.30pm **Close**

Biographies

Ana Harris is a Vice President of State Street Global Advisors and a Portfolio Strategist in the Global Equity Beta Solutions Group. In this role, Ana acts as a key link between the passive equities investment team and SSgA's clients and distribution teams.

Ana joined State Street Global Advisors in June 2013 from Russell Investments where more recently she worked in the research of active and passive equity managers. At Russell, Ana started as a portfolio analyst supporting the firm's multi-manager funds. Prior to that, she worked as a consultant at Towers Perrin in both Paris and London.

Ana is a CFA charterholder and a graduate of the School of Economics and Management (Technical University of Lisbon).

Blair Reid joined BlueBay in August 2013 from Goldman Sachs Asset Management where he spent 6 years as a Lead Portfolio Manager in the fixed income team, specialising in emerging market debt and FX. Previously he worked for Barclays Global Investors as well as Aon as an investment consultant. He has a Bachelor of Economics degree from Macquarie University in Sydney, an MBA from London Business School and is a Fellow of the Institute of Actuaries.

Sandra Rockett is Director of Business Development in ILIM. Prior to joining ILIM in 2014, Sandra was Head of Financial Planning and Pension Advisory Services in Davy responsible for providing financial and investment advice to High Net Worth Clients, pension funds and charities and for the management and development of the Davy pension business. Sandra previously worked in Mercer where she held a role as Actuarial Consultant working with a range of public sector and multinational clients in relation to their pension arrangements. Sandra is a graduate in Actuarial Finance and Economics from University College Dublin, a Fellow of the Society of Actuaries in Ireland and sits of the Society's Finance and Investment Committee.

Ronan Lyons is the Assistant Professor of Economics at Trinity College, Dublin, where his areas of research include urban economics, housing markets and global economic history. Ronan's doctoral thesis (at Balliol College, Oxford,) covered the economics of Ireland's recent property market bubble and crash. The unifying aim of much of his research – from European property markets to long-run series on stock market prices and wages – is to understand how economic systems work and thereby contribute to our understanding of what makes a city, region or country thrive. He is also interested in how decisions are made and some of his economic research involves behavioural aspects, such as the impact of information.

In 2004, he set up the Economic Research unit at daft.ie, and has since been responsible for the quarterly reports on Ireland's residential sales and lettings markets. The "Daft Report" has grown to become one of the most widely cited economic reports in the country.