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## INVESTMENT SEMINAR & MiFID 2 UPDATE

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BILL CASEY, DIRECTOR OF FINANCIAL ADVISOR SERVICES, CONEXIM

24TH OCTOBER 2017



# AGENDA



10:00am - 10:05am

**Welcome & Introduction**

*Bill Casey, Director of Financial Advisor Services, Conexim*

10:05am - 10:40am

**Morningstar – Finding Value in a Low Return World**

*Emma Morgan, CFA, Portfolio Manager, Morningstar Investment Management*

10:40am - 11:15am

**Fundhouse – Focus Shifts to Judging the Fund Judges**

*Andrew MacFarlane, Investment Director, Fundhouse*

11:15am - 11:50am

**PortfolioMetrix – Comparing Portfolios & having a Robust Analysis Framework**

*Marc Westlake, Chief Executive Officer - Ireland, PortfolioMetrix*

11:50am - 12:25pm

**Conexim – MiFID 2, PRIIPS, and its implications for Financial Advisors**

*Ronan Gahan, Managing Director, Conexim*

12:25pm - 12:30pm

**Q & A - Close**





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