

GLOBAL INVESTMENT SUMMIT 2024

JANUS HENDERSON'S MID-YEAR OUTLOOK

AGENDA 21 May 2024

Tuesday, 21 May 2024

06:30 MDT / 08:30 EDT /
13:30 BST / 14:30 CEST

Welcome to the conference

Sarah de Lagarde, Global Head of Corporate Affairs

06:35 MDT / 08:35 EDT /
13:35 BST / 14:35 CEST

Navigating change: three drivers for long-term investment positioning

Update from our CEO, Ali Dibadj

interviewed by Seth Meyer, Global Head of Client Portfolio Management

06:50 MDT / 08:50 EDT /
13:50 BST / 14:50 CEST

Balancing purpose and profit: investing in AI for positive change

A practical case study

Sarah de Lagarde, Global Head of Corporate Affairs

Alison Porter, Technology Portfolio Manager

07:05 MDT / 09:05 EDT /
14:05 BST / 15:05 CEST

Where do we go from here?

Macro outlook from Janus Henderson's asset class heads

Jim Cielinski, Global Head of Fixed Income

Lucas Klein, Head of EMEA and Asia Pacific Equities

Marc Pinto, Head of Americas Equities

Hosted by Matthew Bullock, EMEA Head of Portfolio Construction and Strategy

07:25 MDT / 09:25 EDT /
14:25 BST / 15:25 CEST

Tapping into long-term engines of growth

Thematics panel

Andy Acker, Portfolio Manager, Healthcare

Denny Fish, Portfolio Manager, Global Technology and Innovation

Guy Barnard, Co-Head of Global Property Equities

Hamish Chamberlayne, Head of Global Sustainable Equities

Hosted by Jen Nichols, Client Portfolio Manager, Equities

AGENDA (continued)

07:55 MDT / 09:55 EDT / 14:55 BST / 15:55 CEST	Inflation, rates and central bank policy – what's next? <i>Fixed income panel</i> John Lloyd, Lead, Multi-Sector Credit Strategies John Kerschner, Head of US Securitised Products Greg Wilensky, Head of US Fixed Income Thomas Haugaard, Portfolio Manager, Emerging Markets Debt Hosted by Jessica Leoncini, Head of Fixed Income Client Portfolio Managers
08:25 MDT / 10:25 EDT / 15:25 BST / 16:25 CEST	Looking beyond the magnificent seven <i>Global & European Equities panel</i> Julian McManus, Portfolio Manager, Global Alpha Equity team Tom O'Hara, Portfolio Manager, European Equities Rory Stokes, Portfolio Manager, European Equities Hosted by Valerie Gery, Client Portfolio Manager, Investments
08:55 MDT / 10:55 EDT / 15:55 BST / 16:55 CEST	US Equities: the dawn of a new era? Brian Demain, Mid-Cap Growth Portfolio Manager Jonathan Coleman, Portfolio Manager, US Small/Mid-Cap Growth team Jeremiah Buckley, Portfolio Manager, US Equity Hosted by Lara Castleton, US Head of Portfolio Construction and Strategy
09:20 MDT / 11:20 EDT / 16:20 BST / 17:20 CEST	Putting the pieces together: client solutions and Multi-Asset portfolio implications Matt Peron, Global Head of Solutions Adam Hetts, Global Head of Multi-Asset
09:35 MDT / 11:35 EDT / 16:35 BST / 17:35 CEST	Event concludes Sarah de Lagarde, Global Head of Corporate Affairs

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