



BREAKTHROUGH OR BREAKDOWN: CAN THE RECOVERY BE SUSTAINED?

LONDON 2010 CONFERENCE AGENDA

MONDAY JUNE 14

(All main sessions, including lunch will be held in the Westminster Ballroom)

7:45-8:45 Registration & Continental Breakfast (Whitehall Suite)

8:45-9:00 **OPENING REMARKS**

Martin Barnes - Conference Chair & Managing Editor, *The Bank Credit Analyst*

9:00-10:30 **MAJOR THEMES FOR FINANCIAL MARKETS**

Moderator - Martin Barnes

Stephen King - Group Chief Economist, *HSBC Bank PLC*

Dr. Edward Yardeni - President, *Yardeni Research Inc.*

10:30-11:00 Coffee Break (Whitehall Suite)

11:00-12:15 **THE FUTURE OF EUROPE**

Moderator - Ian MacFarlane, Managing Editor, *European Investment Strategy*

Rt. Hon. Lord Patten of Barnes CH - Last Governor of Hong Kong,
Former European Commissioner for External Affairs, and Chancellor of the
University of Oxford

12:15-2:00 Luncheon

Lessons From History: A Personal Perspective On The Outlook

J. Anthony Boeckh - President, *Boeckh Investments Inc.*

2:00-3:30 **NORMALIZING POLICY: IS A MARKET RIOT INEVITABLE?**

Moderator - Martin Barnes

Dr. Otmar Issing - President, Center for Financial Studies, *Goethe University*

Dr. DeAnne Julius - Chairman, *Chatham House*

3:30-5:00 **WHAT TO DO ABOUT ASSET BUBBLES**

Moderator - Martin Barnes

William White - Chairman of the Economics and Development Review
Committee, *OECD*

Philip Coggan - Buttonwood Columnist, *The Economist*

5:00-7:00 Cocktail Reception (Whitehall Suite)



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LONDON 2010 CONFERENCE AGENDA

TUESDAY JUNE 15

(All main sessions, including lunch will be held in the Westminster Ballroom)

7:45-9:00 Continental Breakfast (Whitehall Suite)

9:00-10:30 **GLOBAL STRATEGY: WHERE TO INVEST**

Moderator - Ian MacFarlane

Dr. Ludwig He - Managing Director and Head of Public Market Investment Department, *China Investment Corporation Ltd.*

Andrew Cole - Director, Multi Asset Group, *Baring Asset Management*

Chen Zhao - Managing Editor, *Global Investment Strategy*

10:30-11:00 Coffee Break (Whitehall Suite)

11:00-12:30 **EMERGING MARKETS: AN OPPORTUNITY OR OVERHYPED?**

Moderator - Harvinder Kalirai, Managing Editor, *Foreign Exchange Strategy*

Chris Palmer - Head of Global Emerging Markets Team, *Gartmore*

Plamen Monovski - CIO, *Renaissance Asset Managers*

Arthur Budaghyan - Managing Editor, *Emerging Markets Strategy*

12:30-2:00 Luncheon

A Zero Sum World

Gideon Rachman - Chief Foreign Affairs Commentator, *The Financial Times*

2:00-3:15 **THE OUTLOOK FOR CURRENCIES**

Moderator - David Abramson, Managing Editor, *Commodity & Energy Strategy*

Stephen Jen - Managing Director for Macroeconomics and Currencies, *BlueGold Capital*

Maxime Tessier - Vice-President, Currencies

Caisse de Dépôt et Placement du Québec

Harvinder Kalirai

3:15-4:30 **CLOSING PANEL WITH BCA EDITORS**