VOICES 15 JUNE 23

Time	Session	Speaker
8:55am		Introduction
9:00am	Session 1	**Todd Guyot**, *Portfolio Manager*, **Regal Funds Management**
9:30am	Session 1	**Jarred Rubin**, *Chief Executive Officer & Partner*, **Blackwattle Investment Partners**
10:00am	Session 1	**Anthony Aboud**, *Deputy Head of Equities*, **Perpetual Limited**
10:30am	Session 1	**Todd Barlow**, *Chief Executive Officer & Partner*; **Dean Price**, *Senior Investment Executive & Portfolio Manager*, **Washington H. Soul Pattinson and Co. Ltd**
11:00am	Session 1	**Roger Walling**, *Portfolio Manager*, **ICE Investors**
11:30am		Intermission
11:45am	Session 2	**Omkar Joshi**, *Chief Investment Officer*, **Opal Capital Management**
12:15pm	Session 2	**Sam Berridge**, *Portfolio Manager*, **Perennial Investment Partners**
12:45pm		Intermission
1:30pm	Session 3	**David Aylward**, *Executive Chairman*; **Jun Bei Liu**, *Portfolio Manager*, **Tribeca Investment Partners**
2:00pm	Session 3	**Mark Landau**, *Joint Managing Director & Chief Investment Officer*, **L1 Capital**
2:30pm	Session 3	**Chris Stott**, *Chief Investment Officer*, **1851 Capital**
3:00pm	Session 4	**Ned Bell**, *Chief Investment Officer*, **Bell Asset Management**
3:30pm	Session 4	**Mark Power**, *Head of Income Credit*, **Qualitas**
4:00pm	Session 4	**Andrew Lockhart**, *Managing Partner*, **Metrics Credit Partners**
4:30pm	Session 4	**Steven Fleming**, *Managing Director*, **Gryphon Capital Investments**
5:00pm		Wrap up

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VOICES 15 JUNE 23

Session 1

9:00am

Todd Guyot

Portfolio Manager, Regal Funds Management

Todd is a Portfolio Manager for the Regal Australian Small Companies Fund. Prior to joining Regal in November 2014, Todd was at Moelis Australia in Sydney as its Head of Growth and Smaller Companies. Todd was also previously the Head of Growth and Smaller Companies at BNP Paribas in Sydney and Burdett, Buckeridge & Young from 1998-2002 and 2002-2004 respectively, before establishing Foresight Securities in 2010 as one of three Partners and Managing Directors.

Todd holds a Graduate Diploma of Applied Finance & Investment from the Securities Institute of Australia and has completed an Associate Course majoring in Accounting at the Australian Society of Accountants in Sydney. Todd also holds a Bachelor of Economics from Macquarie University.

9:30am

Jarred Rubin

Chief Executive Officer & Partner, Blackwattle Investment Partners

Jarred Rubin has over 15 years of finance and investment experience, working across institutional sell side equities, corporate and investment advisory.

Most recently, Jarred was a Director at Citigroup in Institutional Equity Sales. Prior to this, Jarred worked in Institutional Equities Sales and Trading roles at Macquarie Group and Commonwealth Bank of Australia. Jarred was also Managing Director, Australia at Union Square Capital Advisors and a Founding Partner at K2 Capital Group, advising corporates and investors.

Jarred holds a Bachelor of Commerce, majoring in Finance and Information Systems from UNSW and is a member of the Australian Institute of Company Directors.

10:00am

Anthony Aboud

Deputy Head of Equities, Perpetual Limited

Anthony is the Portfolio Manager – Industrial Shares, SHARE-PLUS Long-Short and an Analyst.

Anthony has been with Perpetual for 10 years. Prior to joining Perpetual, he worked at Ellerston Capital for two years, where he was the Portfolio Manager for the Ellerston Capital Global Equity Management Fund. Before that, he spent 3 years as an analyst working on a long/short strategy. Prior to joining Ellerston Capital, Anthony worked as an Analyst at UBS Investment Bank for 8 years.

Anthony has a Bachelor of Economics from the University of Sydney and has earned the right to use the Chartered Financial Analyst designation.

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VOICES 15 JUNE 23

10:30am

Todd Barlow

Chief Executive Officer & Managing Director, Washington H. Soul Pattinson and Co. Ltd

Chief Todd Barlow has been CEO and Managing Director of Washington H. Soul Pattinson (WHSP) since April 2015, having previously served as the Managing Director of WHSP's investment firm, Pitt Capital Partners, for five years. Todd has extensive experience in mergers and acquisitions, equity capital markets and investing and has been responsible for a number of WHSP's investments since initially joining the Group in 2004. His career has spanned positions in law and investment banking in Sydney and Hong Kong. Todd has a Bachelor of Business and Bachelor of Laws (Honours) from the University of Technology, Sydney.

Dean Price

Senior Investment Executive & Portfolio Manager, Washington H. Soul Pattinson and Co. Ltd

Dean Price is a senior investment executive and portfolio manager at Washington H. Soul Pattinson & Company Limited (WHSP). WHSP is an absolute return investor investing across multiple asset classes including public equities, private equity, real estate, credit and real assets.

Prior to joining Washington H. Soul Pattinson & Company Limited, Dean worked in the investment banking group at UBS and in the corporate finance group of Deloitte. Dean is also an Executive Director at Pitt Capital Partners.

Dean holds a Bachelor of Commerce, majoring in corporate finance and accounting, and is qualified as a chartered accountant.

11:00am

Roger Walling

Portfolio Manager, ICE Investors

Roger joined ICE Investors in May 2019 – bringing 21 years' experience in the investment industry across a broad range of investment strategies and markets, both domestic and global. Prior to joining ICE, Roger was a Senior Portfolio Manager at the Australian Foundation Investment Corporation (AFIC) in Melbourne. Before this, Roger was a shareholder and Portfolio Manager with Ralton Asset Management. His first investment role was with Cinnabar Equities, a boutique fund manager specialising in global health care.

VOICES 15 JUNE 23

Session 2

11:45am

Omkar Joshi

Chief Investment Officer, Opal Capital Management

Omkar has over 14 years' experience in the financial services industry and significant experience managing long/short strategies at leading global and Australian hedge funds. Prior to founding Opal, he was most recently a Portfolio Manager at Point72 Asset Management, which manages more than US$16bn, and immediately prior to that a Portfolio Manager at multi-award winning hedge fund, Regal Funds Management, which manages more than US$1bn. Prior to this, Omkar was a Partner, Portfolio Manager and Sector Head at Watermark Funds Management. Previously, Omkar was an Equity Research Analyst at Credit Suisse. He began his career at KPMG in the Private Enterprise division.

Omkar is both a Chartered Financial Analyst (CFA) and a Chartered Market Technician (CMT) Charterholder and received his Bachelor of Commerce with High Distinction from the University of New South Wales (UNSW) and Wharton School of the University of Pennsylvania. He has served on the UNSW Business School Alumni Advisory Board (2014 – 2020) and the Corporate Governance Board of the Lincoln Institute of Higher Education (2020 – 2021), and was also the Chair of its Finance, Audit and Risk Committee.

12:15pm

Sam Berridge

Portfolio Manager, Perennial Investment Partners

Sam is a Portfolio Manager and Equities Analyst in the Perennial Value Smaller Companies Team, responsible for the Strategic Natural Resources and Micro Resources Funds. His coverage extends across mid to small cap mining and energy companies.

Sam joined Perennial Value Management in April 2012, from the Royal Bank of Scotland in Sydney where he held the role of Metals and Mining Analyst. During that time, he won Starmine's 2011 top Australian Metals and Mining Analyst Award.

Prior to transitioning to the investment industry in 2008, he commenced his career in the mining industry gaining open pit mining and exploration experience across key commodities including gold, nickel, iron and uranium. During his six years in the mining sector, Sam held roles with industry leaders such as Equigold and Jindalee Resources in Australia and West Africa.

Sam holds a Bachelor of Science Degree (majoring in Geology and Chemistry) and a Postgraduate Honours Degree in Geochemistry from the University of Western Australia. He also holds a Graduate Diploma in Applied Finance and Investment.

VOICES 15 JUNE 23

Session 3

1:30pm

David Aylward

Executive Chairman, Tribeca Investment Partners

David Aylward is the Founder and Executive Chairman of Tribeca. As one of Australia's most recognized fund managers with a career spanning over 30 years, David is Co-Portfolio Manager of the Tribeca Smaller Companies Strategy, one of Australia's longest running active equity strategies in addition to managing the Tribeca Recapitalisation Strategy which is focused on equity capital markets and special situations opportunities. David founded and established Tribeca in 1999 as one of Australia's first boutique investment management firms and has grown the business, working in partnership with some of Australia's largest institutional investors. David is a member of the Australian Institute of Company Directors.

Jun Bei Liu

Portfolio Manager, Tribeca Investment Partners

Jun Bei Liu is the Portfolio Manager of Tribeca's Alpha Plus Fund. Since taking over sole responsibility for managing the Fund, she has quadrupled AUM. She is a passionate, motivated, and dedicated investment manager having built an 18-year career at Tribeca, starting as an equity analyst in 2005 and spending several years as a Portfolio Manager, before taking over the Alpha Plus Fund in 2019.

Jun Bei completed a commerce degree at the University of NSW, followed by a number of additional finance credentials including GAICD and CFA. She is a prolific contributor to Australia's financial services sector, writing a regular column for the AFR and making frequent appearances for key media outlets and as a speaker at industry events. Jun Bei enjoys sharing her knowledge and love for markets with investors and promotes the growth of like-minded females within the financial services community by providing mentor opportunities and serving on the advisory committee for Australian Student Asset Management. Jun Bei is a TEDX speaker, has been appointed as a Core Fund Manager for Hearts and Minds Investments Ltd (HM1) and volunteers for the Raise Foundation Board.

She is fluent in Mandarin and English, only learning English as a 16-year-old, when she emigrated to Australia from China.

2:00pm

Mark Landau

Joint Managing Director & Chief Investment Officer, L1 Capital

Mark Landau is the Joint Managing Director & Chief Investment Officer of L1 Capital. Since co-founding L1 Capital in 2007, Mark has jointly managed L1 Capital's Australian equities strategies including the flagship L1 Capital Long Short Strategy. Launched in 2014, the Long Short Strategy has been the best performing long short fund in Australia since inception (FE Fund Info database – Dec 2022). Prior to founding L1 Capital, Mark worked at Invesco Australia as an Investment Analyst in the large cap Australian Equities Fund and an Investment Manager in the Invesco Smaller Companies Fund. Previously, he was a Senior Strategy Consultant at Accenture, providing financial analysis and corporate strategy advice to a range of ASX100 companies. Mark holds a double degree in Commerce and Economics from Monash University, is an active CFA charterholder and is a Fellow of FINSIA.

2:30pm

Chris Stott

Chief Investment Officer, 1851 Capital

Working for more than 19 years in the Australian funds management industry, Chris has extensive experience investing in Australian equities. Most recently, Chris was the Chief Investment Officer and Portfolio Manager at Wilson Asset Management Pty Limited (WAM) where he was responsible for managing the investment team and overseeing the investment portfolios. During his tenure as Chief Investment Officer at WAM, group funds under management (FUM) grew from $300 million to over $3 billion.

VOICES 15 JUNE 23

Session 4

3:00pm

Ned Bell

Chief Investment Officer, Bell Asset Management

Ned has over 27 year's investment experience. Ned gained his stock selection and portfolio construction skills while working in Boston, San Francisco and Washington. Ned joined Bell Asset Management in Dec 2000 to manage client equity portfolios, formulate and design the Investment Philosophy and Investment Style. Ned has primary research coverage responsibilities for Materials and Telecoms sectors along with secondary responsibilities over Industrials and Health Care sectors. Prior to joining BAM, Ned worked for Loomis Sayles in the US as an Equities Analyst and Portfolio Manager. Ned also worked for Bell Commodities as a futures dealer on the trading floor of the SFE. Ned has a Bachelor of Commerce (Accounting & Finance) degree from Bond University in Dec 1995.

3:30pm

Mark Power

Head of Income Credit, Qualitas

Mark is Head of Income Credit, with responsibility for both the investment outcomes and growth of our income credit business and investment strategies. He joined the firm in 2017 and was previously Head of Build to Rent Debt Fund.

With over 30 years' experience in real estate finance, he has developed a strong reputation in structuring and delivering attractive capital solutions for clients.

Before joining Qualitas, Mark worked at several of Australia's major banks, including senior roles within the Corporate and Institutional Property division at NAB spanning over 20 years.

4:00pm

Andrew Lockhart

Managing Partner, Metrics Credit Partners

Andrew Lockhart is a founder and one of the four Managing Partners who form the Investment Committee at Metrics Credit Partners. Andrew has 36 years' banking, funds management and financial markets experience specialising in leverage and acquisition finance as well as corporate and institutional lending.

Andrew's considerable experience includes being responsible for the origination and portfolio risk management of large, diversified, and complex loan portfolios including corporate restructurings. Andrew holds a Bachelor of Business and Masters of Business Administration from the Queensland University of Technology.

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4:30pm

Steven Fleming

Managing Director, Gryphon Capital Investments

Steven is a founding partner of Gryphon where he acts as the Chief Executive Officer (CEO) and portfolio manager. As CEO, he is responsible for the firm's business strategy, risk management, operational oversight and is a member of Gryphon's Investment Committee.

Steven has more than 27 years' experience across a broad range of areas, including debt capital markets, securitisation, funds management and structured finance. Before co-founding Gryphon, Steven spent five years at Threadneedle Investments as the Australian co-head responsible for managing the firm's global ABS portfolios.

Steven holds a Masters of Economics from Macquarie University, a Bachelor of Commerce from the University of Queensland, is a member of the Australian Institute of Company Directors and qualified as a Chartered Accountant in 1993.