

Investment Think Tank 2026
Venue: Somerset West - Lord Charles
Date: Tuesday, 4 August 2026



Time	Subject	Speaker
07h30-08h30	Registration	
08h30-08h40	Welcome and opening remarks	The Collaborative Exchange
08h40-09h05	How to Make Money When You Shouldn't: Why the Hardest Years Are Often the Best <ul style="list-style-type: none"> • Crisis rewards the disciplined player and punishes the reactive player • What feels right is usually priced in. What feels wrong is where opportunity lives • Heightened uncertainty often creates the most compelling investment opportunities to drive a disproportionate share of long-term returns • Capturing these opportunities is not easy 	Waldo Booyens - Peregrine Capital
09h05-09h30	The Final Stretch: Why the Last Years of Retirement Matter Most <ul style="list-style-type: none"> • Retirement costs don't decline, they peak late • Traditional portfolios are vulnerable in the twilight years • Alternatives introduce crucial diversification • Legacy outcomes are determined at the end, not the start 	Luigi Marinus - PPS Investments
09h30-09h55	From Passive to Precision: The New ETF Playbook for Advisors <ul style="list-style-type: none"> • How the ETF landscape is shifting from passive exposure to active implementation • What advisors should assess before selecting an actively managed ETF • Where fixed income fits, and why wrapper choice should follow portfolio purpose 	Liam Dawson - PortfolioMetrix
09h55-10h20	The Battlefield Changed: Are You Positioned For What's Next? <ul style="list-style-type: none"> • Lessons from history: The cost of failing to adapt • A new world order • Building portfolios that move with the battlefield 	Etienne Roux - Truffle Asset Management
10h20-10h40	Comfort Break	
10h40-11h05	Bubbles, Fault Lines and the Patience Paradox: Investing When Markets Break Their Own Rules <ul style="list-style-type: none"> • When markets are driven by narratives and not fundamentals, fault lines appear. Recognizing where to focus separates investors from speculators • Non-fundamental investors now account for > 80% of daily equity trading creating both distortions and rare opportunities • Disruption creates winners and losers, but the market often can't tell them apart. What gives investors an edge in distinguishing between the two? 	Anton Pienaar - Coronation Fund Managers
11h05-11h30	True Global Reach for Diversification That Matters, Rethinking Investments Insights Through a New Investment Paradigm <ul style="list-style-type: none"> • This session explores how to rethink diversification - not by abandoning traditional portfolios, but by reframing them for resilience in an era of uncertainty • We'll examine how familiar strategies can be adapted to incorporate new dimensions of risk and return, from multi-asset approaches to selective alternatives, without cannibalising core allocations • By understanding the echoes of past market cycles within today's environment, advisors can build portfolios that balance familiarity with innovation, delivering clarity and confidence to clients 	Jonel Matthee Ferreira - Cogence
11h30-11h55	Retirement is No Longer a Destination: It's a Dynamic Phase of Life We Must Design. Don't Retire, Rewire! <ul style="list-style-type: none"> • Instead of planning for a single event - retirement - we need to plan for a long, changing journey • How do I remain financially independent across different phases of my life? • We are planning for financial resilience across a 100-year life 	Hamilton van Breda - M&G Investments
11h55-12h30	What is Keeping DFM's Awake at Night in Building Resilient Investment Portfolios? <ul style="list-style-type: none"> • Balancing the large manager vs small manager allocations in the search for alpha • Using domestic managers vs international managers • Balancing Beta via ETF's and Alpha via Hedge Funds • Managing investor costs 	Luke - McMahon - Glacier Invest Nadir Thokan - Investment Solutions by AlexForbes Eugene Visagie - Optimum Investment Group Moderator: Kevin Hinton - The Collaborative Exchange
12h30-13h15	Lunch Break	
13h15-13h40	Return Diversifier: A Hedge Fund Strategy Providing True Asymmetric Returns <ul style="list-style-type: none"> • The benefits of introducing an asymmetric fund into your portfolios • Approaches to mitigate downside risk in SA & global emerging markets • Will emerging markets continue to outperform developed markets? 	Jacques Marais - Steyn Capital Management
13h40-14h05	Dynamic Allocation with Hedge Precision <ul style="list-style-type: none"> • True active management ability - invests across asset classes to capture opportunities wherever they arise • Focusing on downside protection - using a disciplined risk management approach and hedge fund mindset to help limit losses in volatile markets • Building a multi asset portfolio for consistent outcomes - aims to deliver smoother, more reliable returns through changing market conditions 	Preshendran Odayar - 36ONE Asset Management
14h05-14h30	The DFM Promise: Does the Evidence Stack Up? <ul style="list-style-type: none"> • Assessing different engagement models used between DFMs and advisors • Evaluating whether DFM solutions actually perform better • Clarifying whether advisors actually benefit from DFM partnerships • Identifying obstacles towards creating a more liquid DFM market 	Andrew Cormack - INN8 Invest
14h30-14h55	Beyond Beta: Next-Generation Strategies or a Low-Growth World <ul style="list-style-type: none"> • Why investors continue to face structural headwinds • Client expectations vs. market reality in a low growth world • Next Generation strategies to sustain client portfolios 	Isabella Zagato - Sygnia
14h55-15h15	Comfort Break	
15h15-15h40	Resilience by Design: Hedge Funds in a World of Fault Lines <ul style="list-style-type: none"> • Adapting as the ground moves: opportunities that don't rely on markets rising • How hedge funds reduce correlation spikes during stress • Generating outcomes that matter to clients—shallower drawdowns, faster recoveries, and smoother compounding 	Matthew Pouncett - Laurium Capital
15h40-16h05	The Ground Shifted. Did Your Portfolio? <ul style="list-style-type: none"> • Tectonic events that changed the investment landscape • Managing your behavioural biases when earthquakes hit • When to run and when to stand your ground • Building portfolios that move with the shifts 	Jean-Pierre Matthews - Matrix Fund Managers
16h05-16h40	Retirement Capital Along the Fault Lines: Building Multi-Asset Portfolios for a More Uncertain Future <ul style="list-style-type: none"> • Understand how asset managers are adapting retirement portfolio construction frameworks in response to heightened volatility, inflation uncertainty, and changing market correlations • Insights into how asset allocation decisions across equities, fixed income, alternatives, and global exposures can support long-term retirement outcomes while managing downside risk • Learn how investment managers are balancing capital preservation, income generation, and long-term growth objectives in portfolios designed for retirement investors navigating uncertain markets 	Andrew Vintcent - ClucasGray Dirk Jooste - PSG Asset Management Muntu Mdwara - STANLIB Asset Management Moderator: Eugene Visagie - Optimum Investment Group
16h40-16h45	Closing Comments	The Collaborative Exchange
16h45-18h00	Networking	