

# ASF Investor Seminar – London

Monday 10 June 2019 Bloomberg LP | 3 Queen Victoria Street, London EC4N 4TQ

Time	Topic	Presenter/Panellists
09.45 – 10.00 am	Coffee and registration	
10.00 – 10.05 am	Welcome	<ul style="list-style-type: none"> <li>▪ Pablo Castro, Bloomberg</li> </ul>
10.05 – 10.45 am	<b>Outlook for the Australian economy and residential property markets</b> <ul style="list-style-type: none"> <li>▪ Update on the post-election Australian economy</li> <li>▪ Status of the residential property markets</li> </ul>	<ul style="list-style-type: none"> <li>▪ Bill Evans, Westpac</li> <li>▪ David DeGaris, NAB</li> </ul>
10.45 – 11.35 am	<b>Australian RMBS, performance trends and outlook</b> <ul style="list-style-type: none"> <li>▪ Comment on issuance in 2018</li> <li>▪ Relative value and recent performance of Australian RMBS issues</li> <li>▪ Recent macro prudential changes influencing home loan market</li> <li>▪ Is RBA validation of LLD improving the quality of data reporting</li> <li>▪ Implications of Royal Commission recommendations for RMBS</li> <li>▪ Outlook for issuance in 2019</li> </ul>	<ul style="list-style-type: none"> <li>▪ Moderator – James Kanaris, Westpac                             <ul style="list-style-type: none"> <li>○ Peter Casey, ING Australia</li> <li>○ Richard McCarthy, Perpetual</li> <li>○ Todd Lawler, Bluestone</li> <li>○ UK investor [TBC]</li> </ul> </li> </ul>
11.35 – 11.45 am	<b>Coffee Break</b>	
11.45 – 12.30 pm	<b>Update and outlook for the ABS sector</b> <ul style="list-style-type: none"> <li>▪ Market outlook for auto and equipment lenders</li> <li>▪ Increased market diversification credit card and consumer loan receivables</li> <li>▪ ABS relative value considerations for international investors</li> <li>▪ SME lending and the Australian Business Securitisation Fund</li> </ul>	<ul style="list-style-type: none"> <li>▪ Moderator – Paul Kok, NAB                             <ul style="list-style-type: none"> <li>○ Cullen Hughes, Thinktank</li> <li>○ Eva Zileli, Latitude Financial Services</li> <li>○ Fiona Gaal, ANZ</li> <li>○ Michael Bath, AOFM</li> </ul> </li> </ul>
12.30 pm	Seminar close	<ul style="list-style-type: none"> <li>▪ Robert Gallimore, ASF</li> </ul>

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