

# 2024 LONDON

## INVESTOR SEMINAR

**London | Thursday 30 May | 9am - 12pm**

BNY Mellon, 160 Queen Victoria St, London EC4V 4AN

## Agenda

**8:30am - 9:15am**

**Coffee & registration**

**9:15am - 9:20am**

**Welcome address**

**Robert Wagstaff** | Head of Corporate Trust, Australia | BNY Mellon

**9:20am - 10:00am**

**Australia's economic outlook**

- The big picture for the Australian economy
- The outlook for falling interest rates, migration and unemployment on the housing markets

**Jennifer Hellerud** | Managing Director, Head of Securitisation, Australia | RBC Capital Markets, Australian Securitisation Forum National Committee member [MODERATOR]

**Paul Bloxham** | Chief Economist (Australia, New Zealand and Global Commodities) and Managing Director | HSBC Bank Australia Limited

**Gareth Aird** | Head of Australian Economics (Executive Director) | Commonwealth Bank of Australia

**10:00am - 10:45am**

**Australian RMBS performance trends and outlook**

- Surge in issuance in early 2024
- Relative value and recent performance of Australian RMBS issues
- Expectation of falling interest rates on the home loan market
- Outlook for issuance in 2H 2024

**Sharyn Le** | Global Head, Securitisation Origination | National Australia Bank [MODERATOR]

**Anthony Moir** | Treasurer | Pepper Money

**Ryan Harkness** | Managing Director, Chief Lending Officer | ORDE Financial

**Akeshni Gour** | Treasurer | MA Money

**Imran Shaffi** | Head of Investment Credit & Senior Portfolio Manager | State Street

**10:45am - 11:00am**

**Coffee break**

**11:00am - 11:45am**

**Update and outlook for the ABS sector**

- Increased market diversification and new issuers
- Market outlook for consumer, SME, auto and equipment lenders
- ABS relative value considerations for international investors
- International investor considerations

**James Kanaris** | Head of Structured Finance | Westpac [MODERATOR]

**Stefano Tognon** | Group Treasurer | Latitude Financial

**Paolo Luzzani** | Treasurer | Plenti

**Steven Mixter** | Group Treasurer | Angle Auto Finance

**Ian Bettney** | Portfolio Manager | Janus Henderson Investors

**11:45am**

**Seminar concludes**