One Room.
One Day.

20 of
Australia's
best investors

livewire

LIVE

AGENDA

September 22, 2026

Art Gallery of New South Wales

THE AGENDA

Session 1 MORNING

9:00 AM

Welcome to Livewire Live

Tom McKay, Managing Director, Livewire Markets

9:05 AM

Fireside chat with Jeremy Grantham, GMO

Jeremy Grantham is a global investing legend renowned for his market insights and long-term thinking. From market bubbles to value-based strategies, discover how Grantham is seeing the future for markets.

Jeremy Grantham, Co-Founder & Long Term Strategist, GMO

9:35 AM

The seven deadly sins of investing

Why do smart investors repeatedly make wealth-destroying mistakes? Because human judgment evolved to survive physical threats, not manage global portfolios in a hyperconnected market. This session will unpack seven hard-wired behavioral biases that quietly erode returns and how greater awareness can sharpen your decision-making.

Dr. David Allen, Head of Long/Short Strategies, Plato Investment Management

9:55 AM

Signal or Noise: What matters and what you should ignore

The macroeconomic playbook has changed. Low inflation and rates were an anomaly; geopolitical tensions and de-globalisation are now reshaping asset classes and portfolio outcomes. In this session, our panel uses decades of market experience to help you cut through the noise and focus on the trends that actually matter right now.

Diana Mousina, Deputy Chief Economist, AMP

Roy Keenan, Co-Head of Australian Fixed Income, Yarra Capital Management

Damien Boey, Portfolio Strategist, Wilson Asset Management

Chris Conway, Managing Editor, Livewire Markets (Moderator)

10:30 AM

Morning Tea

Session 2 MID-MORNING

11:05 AM

How self-directed and advised portfolios differ in 2026

A data-driven look at how self-directed and advised portfolios are investing in 2026. What are the key differences, which products are they using and how has this changed in recent years?

Arnie Selvarajah, Chief Executive Officer, Bell Financial Group

11:15 AM

Where is the value on the ASX?

The past 12 months have thrown multiple curveballs. Growth and tech companies have been hit by AI fears, 'blue chip' stocks have fallen from grace while gravity defying valuations for large caps have investors scratching their heads. We've assembled some of Australia's finest stock pickers to help you uncover where the value lies on the ASX.

Dushko Bajic, Head of Australian Equities Growth, First Sentier Investors

James Hawkins, Head of L1 Capital Catalyst Fund, L1 Capital

Arden Jennings, Co-Head of Emerging Companies, Ausbil

Matthew Kidman, Principal and Portfolio Manager, Centennial Asset Management (Moderator)

11:55 AM

Four Megatrends you need to know about (& how to play them)

Step back from daily market gyrations as we put the spotlight on the long-term trends shaping the decade ahead. From commodities and AI to energy infrastructure and defence spending, this session takes you inside the structural opportunities of the future and how to position for them.

1. Rewiring the Grid: The next decade for infrastructure investing
   Sam Franklin, Managing Director, EQT Partners
2. Counting Tokens, Compounding Returns: AI's platform shift
   Nick Griffin, Chief Investment Officer, Munro Partners
3. Commodities: Investing in the age of physical scarcity
   Daniel Sullivan, Head of Global Natural Resources and Portfolio Manager, Janus Henderson Investors
4. Defence has entered its software era
   Jamie Hannah, Deputy Head of Investments & Capital Markets, VanEck

12:35 PM

Lunch

Session 3 AFTERNOON

1:40 PM

Finding Australia's next generation of market leaders

Blackbird is a leading Venture Capital firm that has backed some of the most successful Aussie and Kiwi startups, including Canva, Zoox, SafetyCulture, Culture Amp and Halter. In this discussion, you'll learn about where Blackbird sees innovation in 2026 and the companies they're backing as future leaders.

Rick Baker, Partner, Blackbird Ventures

Samantha Wong, Partner, Blackbird Ventures

John McDuling, Editor-in-Chief, Capital Brief (Moderator)

2:10 PM

Five years from now these are the stocks everyone will wish they owned

The S&P 500 is up more than 70% over the past five years, driven overwhelmingly by a tight cluster of mega-cap stocks. But market leadership doesn't stay concentrated forever. In this session, we go hunting beyond the usual heavyweights to uncover the next-generation global companies everyone will wish they owned five years from now.

Vihari Ross, Portfolio Manager, Antipodes Partners

Andrew Mitchell, Founder and Senior Portfolio Manager, Ophir Asset Management

James Marlay, Co Founder, Livewire Markets (Moderator)

2:50 PM

5 shocking predictions for 2027 and beyond

Many of the best investing opportunities emerge when you think differently from the herd. Our 'Shocking Predictions' are back featuring five fast-paced and thought provoking pitches that will challenge consensus ideas as investors look to 2027 and beyond.

Dougal Maple-Brown, Head of Australian Value Equities, Maple-Brown Abbott

Kellie Wood, Head of Fixed Income, Schroders

Billy Leung, Investment Strategist, Global X

Jay Sivapalan, Head of Australian Fixed Interest, Janus Henderson

Ben Griffiths, Executive Chairman, Eley Griffiths Group

3:20 PM

Event Concludes & Closing Remarks

3:30 PM

Networking Reception

Backed by Australia's Leading Financial Brands

SERIES SPONSOR

BELL FINANCIAL GROUP

EVENT SPONSORS

BELL POTTER

BELLDIRECT ADVANTAGE

EQT Better Never Ends™

Pinnacle

SPEAKERS FROM

ausbil

OPHIR

MUNRO

BLACKBIRD

Antipodes

Plato INVESTMENT MANAGEMENT

Schroders

Janus Henderson INVESTORS

GLOBAL X

YARRA CAPITAL MANAGEMENT

Wilson Asset Management

First Sentier Investors

AMP

ELEY GRIFFITHS GROUP

VanEck

L1 CAPITAL Part of L1 Group

MAPLE-BROWN ABBOTT

GMO