CENTREPOINT ALLIANCE

Risk and Returns Roadshow

17 - 27 February 2026

Time	Description
8:45am	**Arrival and registration**
8:55am (5 mins)	**Welcome**
9:00am (45 mins)	***Proof Not Promises: Delivering Consistent Returns in Global Equities*** Presenter: **Schroders** After a challenging year for many active managers, Ben Arnold, Global Equities Investment Director, cuts through the noise to focus on what really matters for equity investors in 2026. With spiralling deficits, scrutinised AI valuations and record levels of market concentration, separating hype from opportunity has never been more important. This session reviews the key developments shaping Q1 and explores where global investors may find opportunities beyond the market darlings dominating today's headlines. Ben will illustrate how our disciplined research-driven up approach combined with a laser focus on risk management has delivered proof - not just promises - of generating consistent alpha in different market environments. Through practical examples from Schroders' world-class equity teams, attendees will gain actionable insights into maintaining conviction when consensus shifts. This is disciplined, research-driven investing for an unpredictable year. Estimated CPD areas: **General, Technical Competence**
9:45am (45 mins)	***Making Private Funds Less Private*** Presenter: **Dimensional** Join a Dimensional investment professional as they unpack the challenges and considerations involved in evaluating private funds relative to public markets. Drawing from insights from Dimensional study "Understanding Private Fund Performance", this discussion will explore key findings across the major private asset classes including private equity, private credit, venture capital and private real estate. Learn about the variation in performance across private funds, the limitations of common return measures and how private fund performance compares with the public market. Whether you are seeking to understand the nuance of absolute versus relative performance, or the trade-offs in accessing private investments, this session offers valuable takeaways to inform your conversations with clients. Estimated CPD areas: **Technical Competence**
10:30am (30 mins)	**Morning tea break**

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11:00am (45 mins)	***Australian Bonds 2025: Easing Cycles, Persistent Inflation, and Yield Resilience in a Volatile Landscape*** Presenter: **Franklin Templeton** This presentation equips financial advisers with a timely macro overview of the Australian bond market as of late 2025, amid the Reserve Bank of Australia's (RBA) steady cash rate of 3.60% and expectations for a potential 0.25% cut by year-end, followed by gradual easing into 2026. We delve into key trends including rising 10-year yields to 4.44%, persistent inflation in housing and services pushing 30-year rates near 5%, and the expansion of the AUD 2 trillion market—half driven by corporate bonds and hybrids. Attendees will explore opportunities in active fixed income ETFs, tight corporate spreads, and defensive strategies against global volatility, backed by data on unemployment projections above 5% and lowered GDP growth to 1.9%, to optimize client portfolios for income generation and capital appreciation in an uncertain environment. Estimated CPD areas: **Technical Competence, General**
11:45am (45 mins)	***Nothing More Certain*** Presenter: **Generation Life** Australia's financial landscape is shifting, with proposed reforms to superannuation, family trusts, and capital gains creating uncertainty for high-net-worth families. In this environment, clients are increasingly seeking structures that provide clarity and control, with a growing need for adaptable, tax-effective investment vehicles that help clients grow their wealth, safeguard legacies and reduce the risk of disputes. In this session, we will • Share insights from our latest research into adviser and investor attitudes on legislative uncertainty, along with the opportunities for advisers as more clients turn to them for clarity • Explore how Generation Life's award-winning Investment Bonds can help your clients grow and pass on their wealth with confidence in the face of uncertainty. Estimated CPD areas: **Technical Competence, Tax (Financial) Advice**
12:30pm (45 mins)	**Eat and greet** As well as grabbing a bite to eat, why not find someone new to meet and share your personal passion and a practice highlight?
1:15pm (45 mins)	***Critical Illness Insurance: Bridging Medical Realities and Financial Resilience*** Presenter: **AIA** Ever wondered where Critical Illness cover fits into your risk recommendations? Often it might be viewed as a "nice to have", however the truth is that its inclusion is more important than many might think. This presentation highlights the specific need Critical Illness addresses, the reality is life threatening health events happen, having choice and peace of mind when facing into a major health event is vitality important. Estimate CPD areas: **Technical Competence**

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2:00pm (45 mins)	***Fit for Purpose TPD*** Presenter: **TAL** This presentation will look at the evolving TPD landscape covering innovation in both product and advice. From the own to any definition, to the rise in mental health claims, to product innovation, attendees will be provided with the most current information to help build capability in this unique area of advice. Estimate CPD areas: **Technical Competence, Regulatory Compliance and Consumer Protection**
2:45pm (15 mins)	**Wrap-up and close**