Batseta Webinar Presentations 2021

January

Download Presentation	**19 January 2021 (09h30- 10h15)** **Topic: Don’t let Covid infect your decision making** **Speakers: Eroll Shear | Fund Manager at Sasfin Asset Managers** **Topic Synopsis:** Join us as Errol Shear, Fund Manager at Sasfin Asset Managers, discuss the macro-economic outlook for 2021, how long-term investing will result in greater returns and the importance of not making investment decisions based on fear.

Batseta Webinar Presentations 2021

February

Download Presentation	**23 February 2021 (09h30- 10h15)** **Topic | POPI Act: how retirement funds are affected by the changes made to the Act** **Speaker: Noelle Greeff | Senior Associate in Corporate and Commercial Department at Themis Commercial Legal Advisors** **Topic Summary** An outline of the responsibilities placed on an entity by the Protection of Personal Information Act with specific reference to compliance by retirement funds. ____
Download Presentation	**23 February 2021 (10h45- 11h30)** **Topic: Using financial results to evaluate the sustainability of a business** **Speaker: Gustav Raubenheimer | Interim CEO of African Bank** **Topic Summary** We have invited African Bank’s interim CEO Gustav Raubenheimer to take us through their latest results and address these key sustainability drivers, being: • Profitability – current and future • Liquidity and • Solvency

Batseta Webinar Presentations 2021

March

Download Presentation	**16 March 2021 (09h30- 10h15)** **Topic | A global perspective of the South African bond market** **Speaker: Reza Ismail | Head of Bonds at Prescient Investment Management** **Topic Summary** Management, will discuss why the South African bond market is attractive for foreign investors and how an increase in foreign flows can serve as a catalyst for higher returns. He further unpacks why South African pension funds should stay invested. ___
Download Presentation	**16 March 2021 (10h45- 11h30)** **Topic | Should my retirement fund invest in private markets?** **Speaker: Rory Ord | Head: Private Markets | 27four Investment Managers** **Topic Summary** Globally there has been a marked shift toward including significant private markets exposure in retirement funds, but South Africa has lagged this trend. Rory Ord, Head: Private Markets at 27four Investment Managers will look at the questions retirement fund trustees should be asking to help to make this decision.

Batseta Webinar Presentations 2021

April

Download Presentation	**06 April 2021 (09h30- 10h15)** **Topic | Annuitisation** **Speaker: Dolana Conco | Regional Executive at Alexander Forbes**
Download Presentation	**06 April 2021 (10h30- 11h30)** **Topic: The Protection of Personal Information Act** **Speaker: Nadine Mather | Head: Senior Associate at Bowmans Speaker: Deirdre Phillips | Partner at Bowmans**
Download Presentation	**22 April 2021 (14h00- 15h00)** **Topic: B-BBEE Scorecard Reporting for Retirement Funds IThe Current Status and Compliance** **Speakers: Anton van Geest | Transformation Strategist at Alternative Prosperity Advisory & Products** **Speakers: Erosha Govender | Transformation Specialist and CEO at Alternative Prosperity Advisory & Products** **Topic Summary:** B-BBEE Scorecard Reporting for Retirement Funds: The Current Status and Compliance Retirement Funds are required, on a voluntary basis, to report on its B-BBEE Compliance in terms of the Financial Sector Codes to the Financial Sector Transformation Council. Retirement Funds received a request to report to the FSTC although still being voluntary. What should Retirement Funds do? And how should it be done?

Batseta Webinar Presentations 2021

May

Download Part Time 1 Download Part Time 2	**11 May 2021 (09h30- 10h00)** **Topic: Member Data Dilemma: Unclaimed Benefits** **Speaker: Terence Kelly, Director and CEO @The Digital Databank** **Topic summary:** Too many of the problems in the retirement fund industry today are related to not having the correct and up to date member and beneficiary data. When onboarding a new member into a retirement fund the required Personal Data of the person and beneficiaries needs to be complete and verified and the member biometrically authenticated by DHA. So where do we start?
Download Presentation	**11 May 2021 (10h30- 11h00)** **Topic: Case Study: A needs matched approach to Group Risks benefits.** **Speaker: Hercu Pienaar, Technical Marketing Manager @BrightRock Group Risk** **Topic Summary:** We invited Hercu Pienaar, Technical Marketing Manager: Group Risk at BrightRock to share a case study on a needs matching approach towards the structuring of the Group Risk benefits. The pillars to the needs matching approach as well as the impact on individual needs of members within the group will be discussed in depth.

Batseta Webinar Presentations 2021

June

Download Presentation	**08 June 2021 (09h30- 10h15)** **Topic: Member Data Dilemma: Streamlining Monthly pension payments | issuing of statements| the annual processing of the Certificate of Existence | issuing of annual benefit statement** **Speakers: Terry Kelly | Founder and Director at The Digital Data Bank** **Topic Summary:** **Our speakers will unpack the following processes:** • What data should be made available at the on-boarding stage, Monthly pension payments (checking who may have passed away since the last payment, checking for duplicates and verifying bank accounts), Monthly Statements, Certificate of Existence (Remote Biometric Authentication), Annual Benefit Statements and Demonstration of the technology
Download Presentation Download Presentation Download Presentation Video	**08 June 2021 (11h30- 11h45)** **Topic: Aligning South Africa's climate-related financial disclosure with global best practice project.** **Speakers: Cecilia Bjerborn Murai | Consultant at IFC** **Speakers: Wanjiru Kirima | Consultant at IFC** **Speakers: Ben Gaffney | Coordinator at IFC** **Speakers: Brent Cloete | Head of Climate Change and Energy practice at DNA Economics** **Speakers: Louise Gardiner | Sustainable Finance Specialist at IFC** **Topic Summary:** Batseta in association with IFC, is delighted to invite you to an awareness session regarding the ESG integration training scheduled to launch in August 2021. This short session will provide an overview of the content, objectives and intended outcomes of the training course, including alignment with regulatory requirements. We will also cover what can be expected on the FSCA survey.

Batseta Webinar Presentations 2021

June

Download Presentation	**22 June 2021 (09h30- 10h15)** **Topic: Manage "Private Equity: A Beneficial Component of Offshore Allocations"** **Speakers:** Svenja Becker| Managing Partner, Treena Maguire | Director, Client Relations and Norbert Stelzer Managing Partner at Moravia Capital Topic Summary: In South Africa, there is a growing awareness and appetite for Private Market asset classes, as the benefits and risks become better understood and as changes to Regulation 28 enable higher allocations to the different strategies. We invite you to join us to explore International Private Equity as a strategy to maximise growth and strengthen ESG ambitions through your offshore allocations; The benefits to a pension fund portfolio to enhance returns without increasing risk; The strong ESG fundamentals of Private Equity strategies; Some of the concerns that arise when looking at Private Equity; Taking an integrated, holistic approach to investing in the asset class.
Download Presentation	**22 June 2021 (10h45- 11h30)** **Topic: Derivatives demystified** **Speakers:** Odwa Sihlobo | Co-Head of the Multi-Asset team at Prescient Investment Management Topic Summary: Odwa Sihlobo, Co-Head of the Multi-Asset team at Prescient Investment Management, unpacks how we shouldn't overcomplicate derivatives – and why they should be considered within an investment process. He'll cover: • What are derivatives? • How and why investment managers use them. • The risks associated with derivatives – and how to mitigate them

Batseta Webinar Presentations 2021

July

Download Presentation	**13 July 2021 (10h45- 11h30)** **Topic: How to integrate machine learning in the asset manager selection process.** **Speakers: Dr Daniel Page | Head of Quantitative Strategies at 27four Investment Managers** **Topic Summary:** Machine learning or artificial intelligence is all around us and applied in our everyday life, from our cell phones recognizing our faces to voice recognition used for telephonic banking. Machine learning is the process of optimizing data to define unobservable relationships that can be used for predictive purposes. This webinar will provide insight into the application of machine learning within an investment framework, specifically assessing asset managers in attempt to determine those that are expected to outperform in the future

Batseta Webinar Presentations 2021

August

[Download Presentation]	**11 August 2021 (09h30- 10h15)** **Topic: Member Data Dilemma: The Member Data Consolidation approach** **Speakers: Terry Kelly | Founder and Director at The Digital Data Bank** **Topic Summary:** "A single approach to searching, matching and collecting contact data is going to cost too much and take too long. This challenge needs a fresh approach that is going to require all effected parties to agree on a way forward. 4mil people need to be found. The longer it takes to find these people the more difficult it is going to become. The first step is to consolidate all the data in a single folder so that we know what we have compared to what we need. The data needs to be segmented and there will be a different approach to different segments. The Pension industries Unclaimed Benefit problem is not the only fund or trust looking for people. There are quite a few and they all have similar problems. By sharing this insight between all parties we will get the job done faster and cheaper." ____
[Download Presentation]	**11 August 2020 (10h45- 11h30)** **Topic: Member Data Dilemma: The Member Data Consolidation approach** **Speakers: Odwa Sihlobo | Co-Head of the Multi-Asset team at Prescient Investment Management** **Topic Summary:** Odwa Sihlobo, Co-Head of the Multi-Asset team at Prescient Investment Management, unpacks how we shouldn't overcomplicate derivatives – and why they should be considered within an investment process. He'll cover: • What are derivatives? • How and why investment managers use them. • The risks associated with derivatives – and how to mitigate them.

Batseta Webinar Presentations 2021

September

Download Presentation	**07 September 2021 (10h45- 11h30)** **Topic | "Benchmarks as tool in your investment strategy"** **Speaker: Jonathan Brummer| Senior Investment Consultant at RisCura** Topic Summary: Main points: • Benchmarks are an important part of the investment strategy development process • Benchmark best practices – what makes a good benchmark • Benchmarks as a tool to guide outcomes • Benchmarks as a tool to aid understanding • Understanding what some common benchmarks actually mean

Batseta Webinar Presentations 2021

September

Download Presentation	**21 September 2021 (09h30- 10h15)** **Topic | Data insights into Sustainable Investing –measurement and reporting.** **Speaker: Hannah Simons | Head of Sustainability Strategy at Schroders** **Topic Summary:** Hannah Simons, Head of Sustainability Strategy at Schroders will share her insights into how sustainability is measured and reported upon at the global asset and wealth management firm, Schroders. Schroders has been incorporating sustainability into investments since 1998, when they hired their first sustainable investing analyst.
Download Presentation	**21 September 2021 (10h45- 11h30)** **Topic | Four Part Webinar Series on Member Data Dilemma** **Speaker: Terry Kelly | CEO at The Digital Data Bank** **Topic Summary:** Following the three sessions on Member Data Dilemma, Terry Kelly will utilize this last segment to recap the discussions from the previous sessions and provide a way forward to tackle the member data issues. A recap of what was previously covered: 11 May - Member Data Dilemma: Unclaimed Benefits 08 June - Member Data Dilemma: Streamlining Monthly pension payments | issuing of statements | the annual processing of the Certificate of Existence | issuing of annual benefit statement 10 August - Member Data Dilemma: The Member Data Consolidation approach

Batseta Webinar Presentations 2021

October

Download Presentation	**05 October 2021 (09h30- 10h15)** **Topic | ESG: The Ugly Truth!** **Speaker: Chinell Bermosky | Old Mutual Corporate Consultant (Large Enterprise Market) at Old Mutual Corporate** Topic Summary Unintended consequences are outcomes of a purposeful action that are not intended or foreseen. What are some of the unintended consequences of ESG investments and the strategy you choose?
Download Presentation	**05 October 2021 (10h45- 11h30)** **Topic: Group Risk Needs-matched insurance** **Speaker: Schalk Malan | CEO and Clyde Parsons | Chief Innovation Officer at BrightRock Group Risk** Topic Summary Bringing change to the group risk market

Batseta Webinar Presentations 2021

October

Download Presentation	**14 October 2021 (10h00- 11:00)** **Topic | Are investors getting the information they want from ESG reports?** **Moderator: Corli le Roux, Independent ESG Consultant and Associate at Six Capitals Advisory** **Eszter Vitorino | Senior Responsible Advisor at Kempen Capital Management** **Kutlwano Mokhele | Member Benefits Coordinator at National Union of Metalworkers of South Africa** **Lin Sanford | Principal Executive Officer (CPEO) at Mondi Mpact Group Fund** **Louise Gardiner | Consultant at International Finance Corporation** **Topic Summary** Recently, there has been a significant increase in investor interest and engagement on companies' performance and disclosure on environmental, social and governance (ESG) issues. Investors are increasingly relying on a wide range of ESG data when making decisions about where to invest their money. The increase in sustainable and responsible investment has put ESG metrics higher up on the list of performance considerations. This is increasingly important in emerging and developing economies, where the boom in investment opportunities combined with significant sustainability challenges, such as climate change, biodiversity loss, and human rights presents investors with new risks and opportunities. Join the GRI Africa and Batseta webinar exploring whether investors are getting the information they want from ESG reports?

Batseta Webinar Presentations 2021

October

Download Presentation	**19 October 2021 (09h30- 10:15)** **Topic | The Value Advice** **Speaker Delores La Vita |Old Mutual Corporate Consultant (Large Enterprize Market) at Old Mutual Corporate** **Topic Summary** With an increased focus on costs, it is worthwhile re-emphasizing the value of advice. Given that so few South Africans retire comfortably, outcomes for members should be a key focus of our industry. Please join us as we share our insights

Batseta Webinar Presentations 2021

November

Download Presentation	**02 November 2021 (09h30- 10h15)** **Topic | An offshore perspective on Private Equity allocations** **Speaker: Tanja Lukas| Investment Director at Schroders Capital** **Topic Summary:** In this webinar, Tanja Lukas of Schroders Capital will explore the case for offshore Private Equity allocation in an institutional investor's investment strategy and explore the global trends in institutional investor allocation to the asset class. Schroders Capital is the private market investment division of Schroders, the global asset management group. Schroders Capital is responsible for managing $70 billion of client capital across a diversified range of asset classes, including Private Equity, Real Estate, Infrastructure, Securitised Products, Insurance Linked Securities and Impact. Its team has been operating in private markets for over two decades.
Download Presentation	**02 November 2021 (10h45- 11h30)** **Topic: Infrastructure: Why now?** **Speaker: Luzuko Nomjana | Portfolio Manager and Credit Structuring Specialist at Prescient Investment Management** **Speaker: Conway Williams | Head of Credit at Prescient Investment Management** **Topic Summary** **Join Conway Williams and Luzuko Nomjana from Prescient Investment Management as they define what infrastructure is, and they'll also unpack why one should consider investing in infrastructure right now. The team will explain the direct link between infrastructure investment and economic growth, as well as its positive social and environmental impact. Furthermore, they will emphasise what investors should expect from their infrastructure managers.**

Batseta Webinar Presentations 2021

November

Download Additional information Download Additional information What video	**23 November 2021 (09h30- 10h15)** **Topic: Listed Equity Stewardship in practice** **Speaker: Robert Lewenson | Head of Stewardship at Old Mutual Investment Group** **Speakers: Sean Doherty | Chief financial officer at Transaction Capital** **Speakers: Darwin Van Rooyan | Company Secretary at The Foschini Group.** **Topic Summary**: In this session, Old Mutual Investment Group will unpack stewardship practices in the listed equity market with examples of how companies have responded to this integration process within our industry. Robert Lewenson will also engage speakers from two investee companies who will discuss their ESG integration process, and the benefits of deep stewardship practices offered by Old Mutual Investment Group. The panel will also touch on how we can help achieve the Sustainable Development Goals (SDG's), together.
Download Presentation	**23 November 2021 (10h45- 11h30)** **Topic: Perspectives on ESG and investment management** **Speakers: Professor Evan Gilbert| Strategist at Momentum Investments** **Topic Summary:** Momentum Investments recently published an edition of its Midfields research publication that focused on investing in terms of environmental, social and governance (ESG) principles. This publication represents the company's perspectives on a wide range of related topics that we will be covered in this presentation: • Why is it important to worry about this topic?, What do we mean by responsible investing?, Is it just a passing fad or is it really a fundamental change in how we invest?, What is greenwashing and how does it apply to ESG investing?, How can, and do, investment managers integrate ESG considerations into their investment?, How do we integrate ESG into our portfolio management activities in terms of?, Single asset portfolios: fixed income and property, Multi-asset-class portfolios and Alternative investment portfolios: The Momentum Impact Investment Funds