Agenda

Bedfordshire Annual Training Day
Borough Hall, Bedford
Wednesday 29 March 2017 10.00 – 16.00

10.00 – 10.15
Overview of the day (Hymans Robertson)
Key characteristics of the Fund

10.15 – 11.15
Exploration of Investment Beliefs
- Overview
- Investment beliefs homework – results
- Discussions
- Next steps

11.15 – 11.30
Break

11.30 – 12.15
Administration update (Claire Bennett and Zoë Luscombe)

12.15 – 13.00
Lunch

13.00 – 13.45
Pooling
- Border to Coast update (Geoff Reader)
- Approach to monitoring post pooling (Fund and providers)

13.45 – 14.30
Investment structure discussions
- Equity exposure
- Approaches to equity management
- Opportunities in alternatives and bond markets

14.30 – 14.45
Break
14.45 – 16.00

Other topical considerations

- MiFID II update
- ESG and carbon monitoring
- Cost transparency
- Infrastructure
- Experience – actual versus expected
- Manager appraisal process
- Employer specific investment strategies
- 2016 Valuation – transparency, what comes next, etc.