**Breakout Sessions – M&G AIF – Day 2**

**Breakout Session 1 – 13:25 to 14:05**

1 – National Gallery

What’s going to make America even greater? - Dan White, John Weavers

2 – Somerset House

Listed infrastructure – Once in a lifetime - Alex Araujo

3 – Royal Academy of Arts

Where’s your next surprise? A framework for macro asset allocation - Gautam Samarth

4 – Tate Britain

Global Macro - Eva Sun-Wai

5 – Hayward Gallery

Prospects for high yield into the next stage of the economic cycle - James Tomlins

**Breakout Session 2 – 14:55 to 15:35**

1 – National Gallery

What does higher for longer mean for short-dated credit? - Matt Russell

2 – Somerset House

Impact investing: big challenges, bigger opportunities? - John William Olsen, Ben Constable-Maxwell, Jasveet Brar, Michael Rae

3 – Royal Academy of Arts

Emerging markets: diversification and divergence - Claudia Calich

4 – Tate Britain

CCOF - Michael George, Aramide Ogunlana, Robert Scheer

5 – Hayward Gallery

Value - Richard Halle, Shane Kelly

6 – Serpentine Gallery

Central Banks are on final approach, but will it be a hard or soft landing for credit? - Richard Ryan

**Breakout Session 3 – 15:50 to 16:30**

3 – Royal Academy of Arts

The power of growing dividends - Stuart Rhodes

4 – Tate Britain

Prospects for high yield into the next stage of the economic cycle - James Tomlins

5 – Hayward Gallery

Investment grade corporates: challenges and opportunities in 2024 - Ben Lord

6 – Serpentine Gallery

Central Banks are on final approach, but will it be a hard or soft landing for credit? - Richard Ryan

7 – Maddox Gallery

Impact Investing: Private to Publin - Ben Constable-Maxwell, Karen Lam

**Breakout Session 4 – 16:50 to 17:30**

3 – Royal Academy of Arts

What does the future look like for Global Equities? - John William Olsen, Randeep Somel

4 – Tate Britain

From the shadows to the spotlight: the decade for EM is here - Micahel Bourke

5 – Hayward Gallery

European Structured Credit – what’s not to like? - James King

6 – Serpentine Gallery

Investment grade corporates: challenges and opportunities in 2024 - Ben Lord