

AGENDA

8TH AUGUST 2015



Calamatta Cuschieri
YOUR PARTNER IN FINANCIAL SERVICES

9.15-9.30



Registration & Breakfast

9.30-10.45

What You Should Know About Equity Investing

- **Macroeconomic view** – An understanding of what's happening in the markets.
- **What are equities** – Looking into different types of equities and identifying how they fit into portfolios with different mandates.
- **ETFs, mutual funds and equities** – Understanding the difference between ETFs, mutual funds and individual equities.
- **Portfolio diversification** – Best mix to maximise the risk-reward ratio of the portfolio. Diversification is key to be able to generate positive returns and reach objectives without large shocks to the portfolio.
- **Why are European shares attractive?** – Why we think European shares are attractive.
- **How sovereign yields effect equities** – Talk of rate hikes in the US and yields on sovereigns in Europe also increasing. How does this effect equity valuations?
- **CC Top Equity Picks** – The names we think will generate alpha in a portfolio.
- **Myopic loss aversion** – Understanding the different ways of looking at the markets. Looking at the big picture rather than short term performance.
- **Fundamental analysis** – Understanding how to pick stocks which are trading at a discount to their intrinsic value and understanding what you need to be looking out for in the financial statements.
- **Technical analysis** – Timing entry points into and out of the market. With volatility increasing, technical analysis became more important and can make a big difference in performance.
- **Behavioural finance** – Explaining which mistakes could be avoided resulting in better decision making and performance.
- **Outlook** – Where we think equity markets are heading and how your portfolio can benefit from the markets.



SPEAKER: *Mr. Kristian Camenzuli - Investment Manager*

10.45-11.00



Q & A- Floor open for questions

11.00-11.15



Coffee Break

11.15-12.00

CCTrader Tutorial

- General overview of CCTrader
- Tips and tricks on how to use the platform
- Research function
- General overview of the new mobile trader platform
- New features on the mobile platform, such as HTML5 charting and live quotes on US markets.



SPEAKER: *Ms. Shelaine Cassar - Online Support Officer*

12.00 - 12.15



Q & A – Floor open for questions

ABOUT THE SPEAKERS



Kristian Camenzuli

Mr. Kristian Camenzuli is an Investment Manager (IM) at Calamatta Cuschieri. He graduated with Honours in Economics from the University of Malta in 2005 and is currently a Level III Chartered Financial Analyst (CFA) candidate. Kristian specialises in blue-chip equities. He co-manages Calamatta Cuschieri's Euro Equity Fund and carries out in depth analysis on international equities. He is also an IM for other funds for which Calamatta Cuschieri Investment Management is appointed IM and sits on a number of investment committees.

Shelaine Cassar

Ms. Shelaine Cassar is an Online Support Officer at Calamatta Cuschieri and forms part of the CCTrader team. Ms. Shelaine Cassar assists customers with demos, support and functionality requests. Personal tutorials are also available on request.



Calamatta Cuschieri
YOUR PARTNER IN FINANCIAL SERVICES

 25 688 688 |  [CC.COM.MT](https://www.cc.com.mt)

CALAMATTA CUSCHIERI & CO. LTD IS A FOUNDING MEMBER OF THE MALTA STOCK EXCHANGE AND IS LICENSED BY THE MFSA.