2020 GLOBAL SUMMIT

Reshaping the future: Adapting in a COVID-19 world

Tuesday, 8 September 2020

9.30 United Kingdom | 12.30 United Arab Emirates | 14.30 Thailand | 15.30 Malaysia | 16.30 Hong Kong | 17.30 Australia

09.15 - 09.30 UK
16.15 - 16.30 HK

Log in to virtual webcast series

Click the link in your confirmation email up to 15 minutes in advance of the live webcast.

09.30 - 10.10 UK
16.30 - 17.10 HK

US vs China – which side will the EU take? A fireside chat with Jean-Claude Juncker

As tensions continue to mount between the US and China, Europe has found itself caught in an interesting quandary. In today's session, Jean-Claude Juncker, Former President of the EU Commission, will discuss how geopolitics, technology and trade differences might shape the EU's decision and the impact their eventual alignment will have on financial markets and investments.

Jean-Claude Juncker, Former President of the EUR Commission (2014-2019)

Moderated by: **Kirk West**, Executive Director and Head of International Business, Principal Global Investors

10.10 - 10:50 UK
17.10 - 17.50 HK

Investment Implications

Economic uncertainties due to a global pandemic, coupled with ongoing social stressors and political tensions, will influence investors and investment strategies in the near term and into the future. Our investment panel shares their views on potential headwinds and where they might look to find opportunities for growth.

Moderated by: **Thomas Cheong**, President Principal Asia

Panelists:

Binay Chandgothia, Managing Director, Portfolio Manager and Head of Asia, Principal Global Asset Allocation

Patrick Chang, Chief Investment Officer, Equities, Principal Asset Management, Malaysia

Juliet Cohn, Portfolio Manager, Principal Global Equities

10.50 - 11.00 UK
17.50 - 18.00 HK

Closing remarks

Wednesday, 9 September 2020

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09.30 - 10.10 UK 16.30 - 17.10 HK	**Modern monetary theory: blurring the line between central banks and governments, a conversation with Stephanie Kelton** In this session Stephanie Kelton, Professor of economic and public policy at Stony Brook University and leading expert on MMT, will share her insight on the blurring line between central banks and governments in much of the world. She will highlight how she thinks the relationship between the world's major central banks and governments has changed and what that could mean for the macroeconomic environment in the short and longer term. **Stephanie Kelton**, Professor of economic and public policy, Stony Brook University Moderated by: **Seema Shah**, Chief Strategist, Principal Global Investors
10.10 - 10:50 UK 17.10 - 17.50 HK	**Investment Implications** Our investment panel will offer their views on MMT, the prospect of inflation amid unprecedented stimulus programs and the potential implications for investors and investment strategies in the near term and looking further out. Moderated by: **Seema Shah**, Chief Strategist, Principal Global Investors Panelists: **Damien Buchet,** Partner, Portfolio Manager and CIO, EM Liquid Alternatives and Total Return, Finisterre Capital **Andrew Thornton**, Chief Executive Officer, Principal Real Estate Europe **Howe Wan**, Managing Director, Head of Asia Fixed Income, Principal Global Investors
10.50 - 11.00 UK 17.50 - 18.00 HK	**Closing remarks**

Thursday, 10 September 2020

9.30 United Kingdom | 12.30 United Arab Emirates | 14.30 Thailand | 15.30 Malaysia | 16.30 Hong Kong | 17.30 Australia

09.15 - 09.30 UK 16.15 - 16.30 HK	**Log in to virtual webcast series** Click the link in your confirmation email up to 15 minutes in advance of the live webcast.
09.30 - 10.10 UK 16.30 - 17.10 HK	**The phoenix and the unicorn: companies disrupting themselves and how to find them. A conversation with Peter Hinssen** **Peter Hinssen**, Technology entrepreneur, lecturer and author of *The Day After Tomorrow,* will speak about and examine current systemic shocks and how to prepare individuals and organizations for a world that is constantly changing. He will discuss the importance of staying relevant and forward-looking, the significance of being open to discarding policies, business models that no longer work and the need to be more prepared in the future. Moderated by: **Kirk West**, Executive Director and Head of International Business, Principal Global Investors
10.10 - 10:50 UK 17.10 - 17.50 HK	**Investment Implications** (pre-recorded) The global pandemic has brought the notion of Disruption to the forefront as a key theme which has had a profound effect on companies' ability to adapt in this environment. In this session, we'll explore companies that have been able to take advantage of disruption and thrive in the current environment, we'll look firms that haven't been able to adapt their business models and lastly, broad implications to financial services companies moving forward. Moderated by: **Todd Jablonski**, Chief Investment Officer, Principal Global Asset Allocation Panelists: **Chris Carter**, Partner, Origin Asset Management **Hans Vander Plaats,** Managing Director, Client Portfolio Manager, Aligned Investors
10.50 - 11.00 UK 17.50 - 18.00 HK	**Closing remarks**