

MEET THE MANAGERS INVESTMENT FORUM 2014

Galway, Limerick, Cork and Dublin events 28-30 May

This event brings some of Aviva Investors' and BlackRock's top investment professionals to you in order to share their insights on the opportunities and risks across asset classes and markets.



- Hear the latest market insights direct from Fund Managers and Investment professionals
- Explore key themes influencing the return outlook
- Discover where our partners see the most compelling investment opportunities
- Earn **1.5 CPD hours** for the event

Agenda

| Presentation | Speaker |
|---|---|
| Multi Asset Investing | Nick Samouilhan, Multi Asset Fund Manager at Aviva Investors |
| UK Property | Philip Nell, UK Property Fund Manager at Aviva Investors |
| High Yield Equities | David Lis, Head of Equities Aviva Investors or Richard Saldanha High Yield Equity Fund Manager Aviva Investors |
| Absolute Return Bond Investing (Cork and Dublin only) | Alan Lawrence, Director of Retail Business at BlackRock or Clair Turketo Fixed Income Product Strategist at BlackRock |

Ian Tracy, Product Marketing Executive at Aviva Life & Pensions will also update you on some key investment initiatives, including giving you a sneak peak at our new broker and customer fund centres.

You have a choice of dates and venues so you can choose the one that suits you best.

ENHANCING OUR RISK PROFILER

Helping you understand your customers attitude to risk

Our Risk Profiler allows you to identify your clients' attitude to risk by answering 10 simple questions. In April we improved our risk profiler to include 7 potential client risk rating outcomes. Improvements to the tool include a more detailed results screen with the goal, the experience and the expectations of your customer, based on the answers to the 10 questions given, as well as sample investment mix's for each of the risk ratings. There are 2 versions of the Risk Profiler Tool available to you and your clients. Simply click on the links below to access

- [Broker Risk Profiler Tool](#)
- [Customer Risk Profiler Tool](#)

We've also updated the hard copy of the risk profiler to reflect these enhancements. This can be downloaded by [clicking here](#).



New fund guide, understanding our risk ratings sales aid and understanding securities lending sales aid

We have changed how we risk rate our funds. Our funds risk ratings are now broadly in line with guidelines recommended by the European Securities and Markets Authority (ESMA). The ratings are based on a scale of 1 to 7 with 1 being the lowest and 7 the highest.

- [Click here](#) to download our Financial Broker Guide - Understanding our Risk Ratings sales aid
- [Click here](#) to download our new Customer Fund Guide
- [Click here](#) to download our Understanding Securities Lending sales aid



Our fund factsheets, daily performance scorecard and [our fund range page](#) in the funds section of www.avivabroker.ie have also been updated. These risk ratings will be updated quarterly going forward.

FUND AND MARKET HIGHLIGHTS

Markets relatively stagnant in April

- The markets kicked off the second quarter with relatively benign performance. The US and emerging markets ended April around the same level they started it.
- The Q1 earnings season has started in Europe and the US. In the US, nearly 70% of companies who have reported so far have beaten earnings expectations. Whilst earnings have surprised on the upside by 5.2% (Source: JP Morgan). Despite a better economic backdrop, in Europe earnings have continued to contract.
- Our fund performance broadly reflected this benign environment.

"The information outlined in this email is the opinion of the author and is not intended for use when reviewing the appropriateness of a particular investment or pension products to an individual's financial needs and circumstances."

Warning: These funds may be affected by changes in currency exchange rates.

Warning: Past performance is not a reliable guide to future performance.

Warning: The value of your investment may go down as well as up.

Warning: If you invest in these funds you may lose some or all the money you invest.

Warning: A deferral period may apply to withdrawals and/or switches from certain funds. Please refer to your product documentation for further details.

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