

April 23 – 24, 2014

Swiss Re Centre for Global Dialogue

Rüschlikon, Switzerland

Agenda

Tuesday, April 22, 2014

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| 19.00 | Welcome Drinks and Snacks |
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Wednesday, April 23, 2014

Moderator: Philip Coggan

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| 09.00 – 10.00 | Registration | |
| 10.00 – 10.30 | Welcome | > <i>Michel M. Liès</i> |
| 10.30 – 12.30 | Asset Allocation or Investing in an Uncertain World > Is Sound Asset Allocation Compatible with the World's Desire for Better Business? > Debt, Default and the Evolution of Cooperation > Investing in a World of Financial Repression | > <i>Tim Church</i> > <i>Dylan Grice</i> > <i>James Montier</i> |
| 12.30 – 14.00 | LUNCH BREAK | |
| 14.00 – 16.00 | Macro Economic Outlook | > <i>Marc Faber</i> > <i>John R. Dacey</i> > <i>Steven Drobny</i> > <i>Carson Block</i> |
| 16.00 – 16.30 | COFFEE BREAK | |
| 16.30 – 18.00 | ROUNDTABLE GROUP 1 | |
| | > Peer to Peer Lending or "Back to the Future" of Banking | > <i>Etienne F. Boillot</i> |
| | > Venture Philanthropy | > <i>Peter Wuffli</i> |
| | > The Economic Situation and Investment Opportunities in Spain | > <i>Julio Cazorla</i> |
| 18.00 – 19.30 | APERRO | |
| 19.30 – open end | DINNER <i>Special Guest:</i> | > <i>James Passin</i> |

Thursday, April 24, 2014

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| 09.00 – 10.30 | ROUNDTABLE GROUP 2 | |
| | > Behavioral Psychology and Capital Preservation | > <i>Dylan Grice</i> |
| | > Harvesting the Promise of the Genomic Revolution; Commercial and Clinical Opportunities | > <i>Jonathan M. Rothberg</i> |
| | > Surviving as Outsiders in an Insiders' Market – the Case of Mongolia and China | > <i>James Passin</i> > <i>Carson Block</i> |
| 10.30 – 11.00 | COFFEE BREAK | |
| 11.00 – 12.30 | ROUNDTABLE GROUP 3 | |
| | > Cyber Intrusion & Defense and the Impact on Business Continuity | > <i>Gunter Ollmann</i> |
| | > Brazil – What's Next? Perspectives from a Brazilian Investor | > <i>Rafael Kisslinger Da Silva</i> |
| | > Status of the Ecosystem | > <i>Klaus Hommels</i> |
| 12.30 – 13.30 | LUNCH BREAK | |
| 13.30 – 15.30 | Education for the 21st Century – an Investment Opportunity? | > <i>Kevin Bartlett</i> > <i>Matt Greenfield</i> > <i>Uwe Feuersenger</i> |
| 15.30 – 16.00 | Closing Remarks | |
| 16.00 | APERRO / COFFEE | |