



MALTA STOCK EXCHANGE plc

# INVESTOR EDUCATION CONFERENCE

**Listen. Learn. Invest.**

An event aimed at increasing the level of financial literacy amongst investors.

GRAND EXCELSIOR, FLORIANA  
SATURDAY 24<sup>TH</sup> OCTOBER 2015



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# PROGRAMME



MALTA STOCK EXCHANGE plc

Presentations will be made in Maltese.

9.00 **Registration and Welcome Coffee**

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9.30 **Introduction**  
Joseph Portelli – Chairman, Malta Stock Exchange plc

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9.40 **Keynote Address**  
Hon. Prof. Edward Scicluna – Minister for Finance

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10.00 **Investor complaints – Common themes we could all learn from**  
Geoffrey Bezzina – Director, Consumer Complaints Unit, MFSA

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10.20 **Building the right portfolio to meet your investment objectives**  
Jesmond Mizzi – Managing Director,  
Jesmond Mizzi Financial Advisors Limited

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10.45 **Panel Discussion**

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11.05 **Coffee Break**

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11.30 **Understanding How Interest Rates Impact Bonds**  
David Curmi – Managing Director, Curmi & Partners Ltd

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12.00 **The Importance of Sound Risk Management**  
Vincent Rizzo – Director, Rizzo, Farrugia & Co. (Stockbrokers Ltd)

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12.20 **Lunch**

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13.20 **Investing in the Right Fund - Asking the Necessary Questions**  
Stephen Borg – Head of Portfolio Management, Bank of Valletta plc

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13.40 **Panel Discussion**

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14.00 **General Discussion and Question Time**

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14.30 **Close of event**

A FEE OF €10 PER PERSON WILL APPLY.

# REGISTRATION FORM

Name & Surname

Address

E-mail

Contact Number

PAYMENT OF €10 IS TO BE MADE BY CHEQUE IN FAVOUR OF  
THE MALTA STOCK EXCHANGE plc.

Bank

Cheque Number

OR

DIRECTLY TO OUR BANK ACCOUNT AS FOLLOWS:

BANK: Bank Of Valletta plc  
IBAN code: MT60VALL22013000000040015918765  
IBAN BIC: VALLMTMT

KINDLY INSERT YOUR **NAME** AND **SURNAME** AND REFERENCE CODE **IEC** IN  
THE TRANSACTION NARRATIVE.

If you would like to keep informed of the latest news and events like/follow us on:



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MFSA  
MALTA FINANCIAL SERVICES AUTHORITY

 RIZZO FARRUGIA  
YOUR INVESTMENT CONSULTANTS

Jesmond  
Mizzi  
FINANCIAL ADVISORS

 MASS

 CURMI  
PARTNER

 BOV  
Bank of Valletta



**HON. PROFESSOR  
EDWARD SCICLUNA MP**

**Minister for Finance, Malta**

Prior to March 2013 as an MEP Prof. Scicluna served as Vice-Chair of ECON. During 2013, he assumed the chairmanship of the EIB, and vice-chairmanship of the EBRD. He also served as Professor and Head of Department of Economics at the UofM, Chairman of the MFSA, Chairman of MCESD, Board Director at CBM, and Electoral Commissioner.

Prof. Scicluna graduated from the University of Oxford with a Diploma with distinction in politics and economics, from the University of Malta with a First Class Honours BA degree in Economics, and the University of Toronto with a Masters and Doctorate in Economics.



**GEOFFREY BEZZINA**

**Director, Consumer Complaints Unit  
Malta Financial Services Authority**

Geoffrey Bezzina is Director, Consumer Complaints Unit at the MFSA and the Authority's Consumer Complaints Manager since 2002. The Consumer Complaints Unit is also responsible for the provision of consumer education and information about financial services. He has edited and co-ordinated the MFSA's publications and other media initiatives aimed towards educating the consumer on various aspects of financial services.



**VINCENT RIZZO**

**Director  
Rizzo, Farrugia & Co.  
(Stockbrokers) Ltd**

Vincent joined Rizzo, Farrugia & Co. (Stockbrokers) Ltd in July 1998 after graduating in Banking & Finance from the University of Malta. In 2003, Vincent was appointed to the Board of Directors and became an Accredited Representative of the Malta Stock Exchange.

Vincent has also been actively involved in providing corporate advisory services to companies seeking a listing of debt or equity on the Malta Stock Exchange. Since July 2010, Vincent has been an independent non-executive Director and member of the Investment Committee of Dominion Global Trends SICAV plc.



**JESMOND MIZZI**

**Managing Director, Jesmond  
Mizzi Financial Advisors Limited**

Jesmond Mizzi is the Managing Director of Jesmond Mizzi Financial Advisors Limited and has been involved in the financial services sector for 18 years.

In 2002 he co-founded Jesmond Mizzi Financial Services Limited after having served as finance and compliance manager. He attended St. Edwards College in Malta and studied in the UK to complete his ACCA.

Jesmond is a business columnist on The Times, The Sunday Times and Business Times, and is a weekly guest on two television financial programmes. He also served as President of the Malta Investment Funds Association and Chairperson of the Financial Services Consultation Council within the Malta Financial Services Authority.



**DAVID CURMI**

**Managing Director,  
Curmi & Partners Ltd**

David Curmi has been in the investment management industry for over 22 years. In 1995 David joined Curmi & Partners Ltd where he set up the firms' two more successful divisions – covering research and discretionary portfolio management. David oversees the firm's investment committee directing investment decisions in fixed income, treasury and equity markets.

He sits on a number of investment committees of international fund managers operating from Malta and acts as primary investment advisor to the Board of a number of major local entities including one of the largest insurance companies in Malta. Between 1989 – 1992 David worked at James Capel & Co (part of HSBC Investment Management UK), where he undertook and passed his London Stock Exchange examinations. David studied Economics at Oxford Brookes University.



**STEPHEN BORG**

**Head of Portfolio Management,  
Bank of Valletta plc**

Stephen Borg is the Head of Portfolio Management at Bank of Valletta p.l.c., supervising over 450 portfolios with €400 million in Assets under Management. He has previously headed the Bank's Research & Analysis Unit, where he was responsible for providing a unified investment approach across the Bank.

He was also involved in the provision of sub-advisory services to Insight Investments on local invested funds and today sits on a number of investment committees within the Bank. Stephen holds an Honours Degree in Banking & Finance from the University of Malta.



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