

# Global Strategy Conference

**THURSDAY 16 JANUARY 2020**

KAP EUROPA

OSLOER STRASSE 5, 60327

FRANKFURT AM MAIN, GERMANY

**07:30 REGISTRATION AND BREAKFAST**

**08:00 OPENING REMARKS**

Michael Schmitz & Alexandre Traub, Co-Heads of the Securities Division for Germany and Austria

**08:05 GLOBAL ECONOMIC OUTLOOK**

Jan Hatzius, Chief Economist

**08:30 ASIA EQUITY STRATEGY**

Kathy Matsui, Chief Japan Equity Strategist

**08:55 FX & RATES OUTLOOK**

Zach Pandl, Co-Head, Global Rates, FX and EM Strategy

**09:20 GLOBAL EQUITY STRATEGY**

Peter Oppenheimer, Chief Global Equity Strategist

**09:45 PANEL DISCUSSION**

Dr. Asoka Wöhrmann, CEO, DWS  
Dr. Bert Flossbach, CEO, Flossbach von Storch  
Stefan Keitel, CEO, DEKA

*Moderator: Peter Oppenheimer, Chief Global Equity Strategist*

**10:15 COFFEE BREAK**

**10:30 US EQUITY STRATEGY**

David Kostin, Chief US Equity Strategist

**10:55 CREDIT STRATEGY**

Lotfi Karoui, Chief Credit Strategist

**11:20 EUROPEAN ECONOMIC OUTLOOK**

Jari Stehn, Head of Europe Economics

**11:45 GLOBAL COMMODITY OUTLOOK**

Jeff Currie, Head of Global Commodities Research

**12:10 ASSET ALLOCATION OUTLOOK**

Christian Mueller-Glissmann, Senior Multi-Asset Strategist

**12:25 PANEL DISCUSSION**

Klaus Kaldemorgen, Chief Strategist, DWS  
Dr. Uwe Rathausky, CEO, GANÉ  
Frank Engels, CIO, Union Investment  
Dr. Jens Ehrhardt, CEO, DJE

*Moderator: Christian Mueller-Glissmann, Senior Multi-Asset Strategist*

**13:00 DATA STRATEGY: MARQUEE-TECHNOLOGY**

Lauren Ash, Co-Head of Marquee Sales

**13:15 LUNCH**