



MONDAY OCTOBER 25

(All main sessions will be held in the Grand Ballroom)

7:45-8:50	Registration (Grand Ballroom Foyer) & Continental Breakfast (Centennial Foyer)
8:50-9:00	WELCOMING REMARKS Bashar AL-Rehany - CEO, <i>BCA Research</i>
9:00-9:15	SETTING THE SCENE Martin Barnes - Conference Chair & Managing Editor, <i>The Bank Credit Analyst</i>
9:15-10:45	DEBATING THE MACRO OUTLOOK <i>Moderator</i> - Martin Barnes David Rosenberg - Chief Economist and Strategist, <i>Gluskin, Sheff + Associates Inc.</i> Brian Belski - Chief Investment Strategist, <i>Oppenheimer Asset Management, Inc.</i>
10:45-11:15	Coffee Break (Centennial Foyer)
11:15-12:15	DISCUSSION PANEL: KEY ISSUES IN THE OUTLOOK <i>Moderator</i> - Martin Barnes Barry Ritholtz - CEO, Director of Equity Research, <i>Fusion IQ</i> , author of "Bailout Nation" and founder of "The Big Picture" blog John Mauldin - President, <i>Millenium Wave Investments</i> , and editor of "Thoughts From The Frontline" e-letter
12:15-2:00	Lunch Presentation (Terrace Room) <i>A Controversial View On Global Warming: It's Good For You!</i> William Happer - Professor of Physics, <i>Princeton University</i>
2:00-3:30	THE OUTLOOK FOR EMERGING MARKETS <i>Moderator</i> - Peter Berezin, Managing Editor, <i>The Bank Credit Analyst</i> Antoine van Agtmael - Chairman and CIO, <i>Emerging Markets Management</i> Arthur Budaghyan - Managing Editor, <i>BCA Emerging Markets Strategy</i> Yan Wang - Managing Editor, <i>BCA China Investment Strategy</i>
3:30-5:00	LOSING FAITH IN FIAT MONEY? IMPLICATIONS FOR CURRENCIES AND COMMODITIES <i>Moderator</i> - David Abramson, Managing Editor, <i>Commodity & Energy Strategy</i> Paul Brodsky - Co-Founder & CEO, <i>QB Asset Management Company</i> Andy Smith - Senior Metals Analyst, <i>Bache Commodities</i> Michael Dooley - Partner, <i>Cabazon Capital Management LLP</i> and Professor of Economics, <i>UCSC</i>
5:00-7:00	Cocktail Reception (Terrace Room)



NEW YORK INVESTMENT CONFERENCE 2010

NAVIGATING TURBULENT WATERS

The Plaza Hotel, New York - October 25-26, 2010

TUESDAY OCTOBER 26

(All main sessions will be held in the Grand Ballroom)

7:30-8:30

Continental Breakfast (Centennial Foyer)

8:30-9:30

THE POST-ELECTION CLIMATE IN WASHINGTON: BIG CHANGES AHEAD

Gregory Valliere - Chief Political Strategist, *Potomac Research*

9:30-10:30

THREE CRITICAL DEVELOPMENTS IN THE GLOBAL ECONOMY 2010-2020

H. "Woody" Brock - President, *Strategic Economic Decisions, Inc.*

10:30-11:00

Coffee Break (Centennial Foyer)

11:00-12:30

GLOBAL INVESTMENT STRATEGY: RISKS AND OPPORTUNITIES

Moderator - Ian MacFarlane, Managing Editor, *European Investment Strategy*

Felix Zulauf - President & Founder, *Zulauf Asset Management AG*

Jeffrey Applegate - CIO, *Morgan Stanley Smith Barney*

Chen Zhao - Managing Editor, *BCA Global Investment Strategy*

12:30-2:15

Lunch Presentation (Terrace Room)

This Is No Time To Go Wobbly, George

Barton Biggs - Managing Partner, *Traxis Partners*

2:15-3:45

WHAT CAN POLICYMAKERS DO?

Moderator - Martin Barnes

Donald Kohn - Vice Chairman, *The Federal Reserve System (2006-2010)*

Ian MacFarlane - Managing Editor, *BCA European Investment Strategy*

3:45-4:45

LESSONS FROM THE CONFERENCE:

A DISCUSSION WITH BCA STRATEGISTS