

Morningstar Investment Conference UK

2026 Agenda

Thursday 7 May

08:00 - 10:00	Check-In, Networking, Exhibition, and Breakfast We're being deliberate in creating networking time, so you can foster new connections. Join other advisers and meet experts from Morningstar. Morningstar Theatre sessions – Exhibit Hall Sponsored Sessions	
10:00 - 10:30	Welcome Address Ollie Smith, MC, will set the stage by outlining the day's themes and content, providing attendees with a clear roadmap of what to expect.	Ollie Smith , Senior Editor, Morningstar
10:30 - 11:00	Geopolitics & Tech: Managing Portfolios Former White House Presidential adviser, economist and bestselling author Dr Pippa Malmgren cuts through the noise to explain how geopolitical shifts are influencing markets, capital flows and portfolio risk. Gain clear context on what to watch, what to ignore, and how to translate macro uncertainty into more confident client conversations.	Dr Pippa Malmgren , Economist & Former Presidential Adviser
11:00 - 11:30	Regulation in Focus This session will provide clarity on the evolving regulatory landscape and its impact on financial advisers.	Kate Tuckley , Sara Woodroffe , Heads of Department, Consumer Investments, Financial Conduct Authority
11:30 - 12:00	Coffee Break Morningstar Theatre sessions – Exhibit Hall Sponsored Sessions	
Head-to-head Breakouts Choose one of the following to attend for each time slot		
Navigating the Investment Landscape Breakout Main Stage Shaping Your Practice Breakout Breakout Room		
12:00 - 12:30	Markets are Political Now: When Power Sets the Price Politics is in the price. Focus on what matters: the power shifts moving markets. Wei Li (BlackRock), Johanna Kyrklund (Schroders), and Anna Rosenberg (Amundi) clarify what's material across US-China tech rivalry, supply chain rewiring, America first policies, energy risk, and Europe's political cycle - so advisers know what to watch, what to ignore, and where to lean.	Wei Li , BlackRock, Johanna Kyrklund , Schroders, Anna Rosenberg , Amundi Moderated by: Monika Calay , Morningstar
12:35 - 13:05	AI in 2026: Winners, Losers, and Investment Strategies AI remains a dominant investment theme in 2026, with infrastructure spending set to rise by 60% to over half a trillion dollars. Michael Field and Kenneth Lamont explore how AI is reshaping industries, identify key beneficiaries, and share effective strategies for investing in equities and funds during this transformative era.	Kenneth Lamont , Principal, Manager Research, EMEA, Morningstar, Michael Field , Market Strategist, Morningstar
		How Financial Advisers Can Support Clients Through Market Volatility and Uncertainty Advisers provide immense value by helping clients endure market volatility. Based on research with top advisers, this session outlines how to develop a comprehensive market volatility plan, with actionable steps to support clients before, during, and after periods of uncertainty.
		Ryan Murphy , Global Head of Behavioural Insights, Morningstar
		Morningstar Investor Perspectives Morningstar's Investor Perspectives series explores the evolving challenges and opportunities for financial advisers. This session examines how advisers are responding to the rise of AI, the growth of private markets, and investor views on long-term investing. Gain insights into where advisers add value and how expectations are evolving.
		Joe Agostinelli , Senior Director of Market Research, Morningstar Ben Lester , Head of Distribution - UK & International, Morningstar

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13:05 - 14:05	Lunch Break Morningstar Theatre sessions – Exhibit Hall Sponsored Sessions		
14:05 - 15:05	Global Lessons for Successful Retirement Strategies This session equips financial advisers with insights into the unique challenges retirees face, including inflation and sequencing risk. Christine Benz and Mike Coop, alongside UK financial planners will discuss safe withdrawal rates and effective strategies to help advisers confidently guide their clients toward successful retirement outcomes.	Christine Benz , Director of Personal Finance and Retirement Planning, Morningstar, Mike Coop , CIO EMEA, Morningstar, Anthony O'Connor , Chartered Financial Planner, RPG	
15:05 - 15:35	Coffee Break Morningstar Theatre sessions – Exhibit Hall Sponsored Sessions		
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15:35 - 16:05	Democratisation of Private Markets: Opportunities and Challenges The emergence of semi-liquid funds provides wealth and retail investors access to private markets. This session explores private equity and debt, investor accessibility, and operational challenges in this evolving space.	David Moffat , The Platforms Association, Benjamin Alt , Schroders, Simon Iversen , M&G Moderated by: Evangelia Gkeka , Morningstar	15:35 - 17:05 WealthTech Showcase: AI for Advisers and Compliance Sprint Discover game-changing innovations in WealthTech! Explore 10+ solutions tackling wealth management industry challenges, from compliance to client engagement.
16:05 - 16:35	Multi-Asset Investing in 2026: What Matters Next With geopolitics, inflation, monetary policy, and market concentration reshaping markets, uncertainty remains high for multi-asset investors. Charlotte Yonge (Troy) David Coombs (Rathbones) and John Roe (L&G) discuss asset allocation, diversification challenges, and portfolio construction for 2026.	Charlotte Yonge , Troy Asset Management, David Coombs , Rathbones, John Roe , L&G, Moderated by: Tom Mills , Morningstar	
16:35 - 17:05	Beyond Brexit: The Long-Term Case for UK Equities Mark Niznik (Artemis) and Victoria Stevens (Liontrust) reflect on a decade of headwinds for UK equities, including persistent outflows and Brexit. They'll assess today's valuation backdrop and consider whether the coming decade represents a reset or a repeat for UK investors.	Mark Niznik , Artemis, Victoria Stevens , Liontrust, Moderated by: Henry Ince , Morningstar	
17:10 - 17:40	Closing Keynote: AI, the Power and the Promise Katie Prescott, Technology Business Editor at The Times, will unpack the current AI landscape and explore the key trends on the horizon. Drawing on her experience interviewing leading figures in global tech, this session will highlight what advisers need to know to navigate this rapidly evolving space.	Katie Prescott , Leading Tech Expert	
17:40 - 18:40	Drinks Reception Kindly sponsored by Jupiter Asset Management		