

MACQUARIE **Base Metals Summit** 21

Monday 11 October 2021

1.00 PM until 5.00 PM (BST)

2.00 PM until 6.00 PM (CEST)

8.00 AM until 12.00 PM (EDT)

8.00 PM until 12.00 AM (AWST)

8.00 PM until 12.00 AM (HKT/SGT)

11.00 PM until 03.00 AM (EDT)

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AGENDA

Time	Agenda Item	Session	Presenter
1.00 PM	General session	Welcome and introduction	Shemara Wikramanayake
1.05 PM	General session	Overview of Macquarie's Commodities business	Nick O'Kane
1.10 PM	General session	Global macroeconomic outlook	Ric Deverell
1.35 PM	General session	Base metals demand and the impact of energy transition	Marcus Garvey
1.55 PM	Polling	Audience participation	
2.00 PM	General session	Do we face a resource constraint? Where copper and zinc supply growth will be found	Alice Fox
2.20 PM	General session	Nickel overview and electric vehicle battery deep dive	Jim Lennon
2.40 PM	General session	China micro focus - aluminium fundamentals	Lynn Zhao
2.55 PM	General session	Global carbon pricing and the implications for metals markets	Serafino Capoferri
3.15 PM	Polling	Audience participation	
3.20 PM	Break		
3.40 PM	Hear from our experts	Macro trading strategies	Ric Deverell in conversation with Ryan Mangan
3.50 PM	Live Q&A	Live Q&A	Lynn Zhao, Alice Fox, Serafino Capoferri, Jim Lennon and Marcus Garvey
4.10 PM	Hear from our experts	Lithium market outlook and Macquarie's marquee equity ideas	Hayden Bairstow and David Ching
4.30 PM	Hear from our experts	ESG considerations for commodity sector investing	Marcus Garvey, Arun Assumall and Maia Mathieson
4.50 PM	Market discussion	Metals trading opportunities	Ben Green, Harrison Probert, Iain Lindsay and Marcus Garvey