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GRANT'S[®]

Fall 2016 Conference

Tuesday, October 4, 2016

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The Pierre Hotel
2 E. 61st Street, Manhattan

- 8:20 a.m. Registration and continental breakfast
- 8:55 Welcome
- 9:00 **Lacy Hunt**, "Large budget deficits and high levels of government debt
—a force for lower interest rates."
- 9:40 **Marc Cohodes**, "One man's treasure is another man's trash."
- 10:20 **Miguel Fidalgo**, "Champagne markets on a beer budget."
- 11:00 Break
- 11:15 **Steven Bregman**, "Indexation: capitalist tool and
delivery agent of the great bubble."
- 11:55 **Julian Robertson** in conversation with **James Grant**
- 12:40 p.m. Luncheon
- 1:40 **Seth Klarman** in conversation with *The Wall Street Journal's* **Bret Stephens**.
- 2:20 **Jeffrey Gundlach**, "The coming pivot in central bank policy."
- 3:00 **Simon Yoo**, "Punctuated equilibrium:
the impact of technology on financial services."
- 3:40 Break
- 3:55 **Keith Ney**, "Surviving financial repression in Europe."
- 4:35 **Martin Fridson**, "Debt defaults: a growth market."
- 5:15 **James Grant**, "Notes on turning 80."
- 5:30-6:30 Reception with music by Toby Williams