Sector Asset Management's 16th Annual

INVESTOR CONFERENCE

PROGRAM | WEDNESDAY 15 JUNE 2016

08:30-09:30 Breakfast Sessions with Sector Investment Managers

Our Investment Managers will be hosting exclusive Breakfast Sessions at our offices. Please register to attend with gk@sector.no, indicating your preferred group session, or if you would like to have a one-on-one session with any of our IMs.

Sector Healthcare	Sector Sigma Nordic	Incentive Active Value
Sector Healthcare Value	Sector EuroPower	Incentive Active Value Long Only
Sector Zen	Asymmetric Global Macro	Sector Global Equity Kernel

09:30-10:00 Registration & coffee @ Astrup Fearnley Museum of Modern Art

10:00-10:10 Welcome

Opening remarks

Wollert Hvide
Managing Director, Sector Asset Management

Conference Moderator

Todd Benjamin
Award-winning journalist and former CNN Financial Editor

10:10-11:00 Curse of the Benchmarks

Dr. Paul Woolley
The Paul Woolley Centre for the Study of Capital Market Dysfunctionality at the London School of Economics

11:00-11:50 Europe – The Political Obstacle to Growth

David McWilliams
Economist, writer and founder of Global Macro 360°

11:50-12:35 The Greatest Stock Market in a Century, 1981-2015 - Why It Cannot Continue -

Horace "Woody" Brock, Ph.D.
President, Strategic Economic Decisions, Inc.

12:35-13:20 Networking Lunch

13:20-14:10 Low Real Rates, Stealing from the Future

Jonathan Tepper
Fund manager, macroeconomic analyst, writer and entrepreneur

14:10-15:25 Investing in a Low Return World

Presentations and talks with Sector Investment Teams
Moderated by Arild Årdal, CIO Gabler Investment Consulting

15:25-15:40 Networking & Coffee Break

15:40-16:30 The Global Minotaur is Kaput

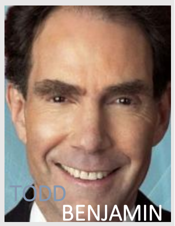
Yanis Varoufakis
Greek economist and former Minister of Finance of Greece

17:00 Drinks & finger food at THE THIEF Rooftop Terrace

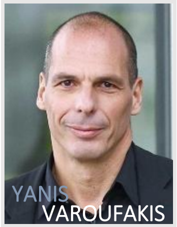
Please see Page 2 for Speakers' Profiles

* Please note the program is subject to change

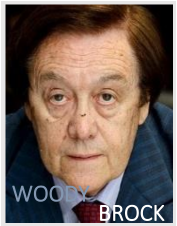
THE SPEAKERS



TODD BENJAMIN is well known to television audiences across the globe. For 26 years he worked as an anchor, correspondent, and financial editor for CNN. During that time he was based in Washington DC, New York, Tokyo, and London. An award winning journalist, Todd has interviewed everyone from Mikhail Gorbachev to Alan Greenspan. Todd has also interviewed several of the world's leading CEOs including Jack Welch, Lou Gerstner, and Carlos Ghosn in his CNN series, Benjamin's Boardroom. For more information, please visit his website: http://toddbenjamininternational.com/



YANIS VAROUFAKIS is a Greek economist who was a member of the Parliament of Greece between January and September 2015. He represented the ruling Syriza party and held the position of Minister of Finance. Varoufakis is a participant in the current debates on the global and European crisis, the author of The Global Minotaur and several academic texts on economics and game theory and Professor of Economic Theory at the University of Athens. For more information, please visit his blog: http://yanisvaroufakis.eu/



HORACE "WOODY" BROCK is the founder and president of Strategic Economic Decisions, an economic forecasting and consulting firm. He has been a consultant to global corporation and other institutions on ongoing structural changes in the global economy. He is the author of American Gridlock: Why the Right and Left Are Both Wrong. Mr. Brock earned his B.A., MBA and M.S. degrees at Harvard University. He holds an M.A. and Ph.D. from Princeton University. For more information, please see Strategic Economic Decisions' website : http://www.sedinc.com/biography.html

PAUL WOOLLEY is a British economist. He was educated at King Edward's School, Birmingham, and obtained a D. Phil from the University of York. Woolley worked for the fund management firm GMO, retiring as Chairman of GMO Europe in 2006. He then founded the Paul Woolley Centre for the Study of Capital Market Dysfunctionality at the London School of Economics in 2007. For more information, please visit the website of the Paul Woolley Centre at LSE:
http://www.lse.ac.uk/fmg/researchProgrammes/paulWoolleyCentre/home.aspx

DAVID McWILLIAMS is one of Ireland's leading economic commentators and was the first economist to identify the Irish boom as nothing more than a credit bubble, warning of its collapse and the consequences for the country. His objective is to make economics as widely available and easily understandable on as many platforms as possible. He is recognised as one of the world's Young Global Leaders by the World Economic Forum, Davos and is a regulator contributor to Google's famed Zeitgeist conference. For more information, please visit his website: http://www.davidmcwilliams.ie/

ARILD ÅRDAL is CIO at Gabler, an advisor to Norwegian Pension Funds, Endowments and Family Offices. In 2000 he was one of five founding partners greenfielding the Scandinavian wealth manager Formuesforvaltning where he served as CIO. Mr Årdal earned his B.Sc. at Norwegian School of Economics in Bergen and M.Sc. at Universität St. Gallen in Switzerland. In between B.Sc. and M.Sc., he worked for Morgan Stanley's investment bank in London and after university, he joined the investment bank again in 1996 as an equity analyst. For more information, please visit his profile on LinkedIn.

JONATHAN TEPPER is a founding partner and Chief Editor of Variant Perception, a global macroeconomic trading and research group. He is the co-author of Endgame: The End of the Debt Supercycle, which was in the best-seller lists of the NY Times and the Wall Street Journal. In 2003, Jonathan started his career as equity analyst at SAC Capital. In 2005 he worked at Bank of America, London, as a VP on the proprietary trading desk. Since 2011, he has been PM of an equity L/S hedge fund at Hinde Capital. For more information, please visit his website: http://jonathan-tepper.com/