



MONDAY OCTOBER 25

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

7:45-8:45

Registration (Grand Ballroom Foyer) & Continental Breakfast (Centennial Foyer)

8:45-9:00

INTRODUCTION & OPENING REMARKS

Martin Barnes - Conference Chair & Managing Editor, *The Bank Credit Analyst*

9:00-9:30

BCA PERSPECTIVES ON THE ECONOMIC AND FINANCIAL OUTLOOK: A DISCUSSION WITH BCA STRATEGISTS

9:30-11:00

DEBATING THE MACRO OUTLOOK

David Rosenberg - Chief Economist and Strategist, *Gluskin, Sheff + Associates Inc.*

Brian Belski, Chief Investment Strategist, *Oppenheimer Asset Management, Inc.*

11:00-11:30

Coffee Break (Centennial Foyer)

11:30-12:45

LOSING FAITH IN FIAT MONEY? IMPLICATIONS FOR CURRENCIES AND COMMODITIES

Michael Dooley - Partner, *Cabazon Capital Management LLP* and
Professor of Economics, *UCSC*

Andy Smith - Senior Metals Analyst, *Bache Commodities*

Harvinder Kalirai - Managing Editor, *BCA Foreign Exchange Strategy*

12:45-2:30

Lunch Presentation (Terrace Room)

A Controversial View On Global Warming: It's Good For You!

William Happer - Professor of Physics, *Princeton University*

2:30-4:00

THE OUTLOOK FOR EMERGING MARKETS

Antoine van Agtmael - Chairman and CIO, *Emerging Markets Management*

Arthur Budaghyan - Managing Editor, *BCA Emerging Markets Strategy*

Yan Wang - Managing Editor, *BCA China Investment Strategy*

4:00-5:00

DISCUSSION PANEL: KEY ISSUES IN THE OUTLOOK

Barry Ritholtz - CEO, Director of Equity Research, *Fusion IQ*, author of "*Bailout Nation*"
and founder of "*The Big Picture*" blog

John Mauldin - President, *Millenium Wave Investments*, and editor of "*Thoughts From
The Frontline*" e-letter

5:00-7:00

Cocktail Reception (Terrace Room)



BCA 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)

7:45-8:45

Continental Breakfast (Centennial Foyer)

8:45-9:15

LESSONS FROM THE CONFERENCE: PART ONE
A DISCUSSION WITH BCA STRATEGISTS

9:15-10:45

WHAT CAN POLICYMAKERS DO?

Speaker to be confirmed

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

10:45-11:15

Coffee Break (Centennial Foyer)

11:15-12:30

TALK TITLE TO BE CONFIRMED

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

12:30-2:15

Lunch Presentation (Terrace Room)

Title To be Confirmed

Barton Biggs - Managing Partner, *Traxis Partners*

2:15-3:45

GLOBAL INVESTMENT STRATEGY: RISKS AND OPPORTUNITIES

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

Jeffrey Applegate - CIO, *Morgan Stanley Smith Barney*

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

3:45-4:45

LESSONS FROM THE CONFERENCE: PART TWO
A DISCUSSION WITH BCA STRATEGISTS