

## DWA Point & Figure Institute Agenda

*April 2016 (Tentative Agenda)*

Thursday, April 21st		
Time	Session	Description
8:00 - 8:30 am	<b>Registration &amp; Breakfast</b>	
8:30 - 9:30 am	<b>The Long Lost Art of Bulding a Long Lasting Business</b>	Tom Dorsey will apply his knowledge from 40 years in this business to delve into the evolution of market conditions and the tools he feels are most useful in managing client assets. Tom will also provide the technical evidence supporting a structural Bull Market in US Equities today.
9:30 - 11:45 am	<b>Surviving &amp; Thriving through Important Market Cycles</b>	The past few years have provided ample evidence toward the importance of adhering to a solid risk management game plan. Risk of being overinvested has given way to the risks of being underinvested, leading to the financial media labeling this <i>"The Most Hated Bull Market in History."</i> We will discuss the market indicators (from Bullish Percents to DALI) that have provided advisors the awareness to participate in this market, with confidence they will adapt effectively to the next one.
11:45 - 12:15 pm	<b>Sponsored Content</b>	
12:15 - 1:15 pm	<b>Lunch</b>	
1:15 - 2:45 pm	<b>Developing a Process Through Tactical Tilt Portfolio Construction</b>	Advisors often wrestle with how to deliver tactical advice within the suitability restraints of clients' risk tolerance demands. The "Tactical Tilt" methodology offers a rules-based asset allocation solution that follows important market trends, while respecting strategic investment boundaries. This customizable implementation concept, and the years of research behind it, will be taught in depth to provide an outline for gaining both scalability and organization within your asset management practice.
2:45 - 3:00 pm	<b>Break</b>	
3:00 - 5:00 pm	<b>Fund Score Analysis &amp; Applying Teambuilder to Fund Portfolios</b>	The Dorsey Wright Fund Score system is applied both to Mutual Funds and ETFs, and is one of the most dynamic measures of technical health we offer. Learn more about how this metric is calculated and applied to pinpoint areas of strength among your fund lineups. Take the analysis a step further with the new and improved Dorsey Wright TeamBuilder Tool, which provides and efficient way target an optimal point between risk and high score.
5:30 - 7:30 pm	<b>Cocktail Reception</b>	Network with all of the attendees over cocktails and heavy hor d'oeuvres.

Friday, April 22nd		
Time	Session	Description
8:00 - 8:30 am	<b>Breakfast and Welcome Remarks</b>	
8:30 - 9:45	<b>Breakout Session #1</b>	Each participant will attend four breakout sessions over the course of the day, descriptions of each session are provided below. Breakout sessions will include:  <div style="text-align: center;"> <b>Building and Incorporating ETF Model Solutions</b>  <b>The DWA Approach to Stock Selection</b>  <b>Developing Yield-Based Solutions with the DWA Database</b>  <b>Momentum Investing's Place in Portfolio Management</b> </div>
10:00 - 11:15	<b>Breakout Session #2</b>	
11:30 - 12:45pm	<b>Breakout Session #3</b>	
12:45 - 1:30	<b>Lunch</b>	
1:45 - 3:00	<b>Breakout Session #4</b>	

# Breakout Session Descriptions

*(In these sessions, we break out into small groups to allow for more interaction among participants and the DWA Analysts. Participants will attend all four sessions listed below.)*

**Building and Incorporating ETF Model Solutions:** DWA has been running Relative Strength driven model portfolios for stocks, ETFs, and even Mutual Funds for over a decade. Along the way, we have learned valuable lessons about best practices in following and implementing these models. During this session we will share these insights, while also highlighting some of the more popular ETF model portfolios we offer.

**The DWA Approach to Stock Selection:** Different market environments call for different stock picking strategies. For instance, in some markets you are better off buying stocks on breakouts, while other times waiting for a pullback is a better option. In this session we will look at what tools are most appropriate for stock selection in today's market, and what to look for when markets change.

**Momentum Investing and its Place in Portfolio Management:** We will discuss the real world application of relative strength (momentum) investing, and will provide valuable insight into why relative strength has been one of the best "factors" of excess return. Additionally, there will be a discussion of some of the best practices for the implementation of relative strength-based solutions.

**Developing Yield-Based Solutions with the DWA Database:** Whether or not interest rates will be higher in the future is not the big debate on Wall Street these days, but rather when those rates will rise dramatically. In this session we look at ways to increase yield in the portfolio outside of traditional fixed income exposure.