



MALTA STOCK EXCHANGE  
INSTITUTE

# 5th Annual Investor Education Conference



An event aimed at increasing the level  
of financial literacy amongst investors.

**Venue:** Malta Stock Exchange  
**Date:** Wednesday 6th November 2019  
**Time:** 09:00 to 13:30 hrs

*Most presentations will be made in Maltese*

# Programme

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| 08.30 | Registration and welcome refreshments  |
| 09.00 | Opening address<br>Mr Joseph Portelli, Chairman, Malta Stock Exchange  |
| 09.10 | Keynote speech<br>Hon. Prof. Edward Scicluna, Minister for Finance   |
| 09.30 | The new MFSA strategic initiatives<br>Mr Joseph Cuschieri, CEO, MFSA   |
| 10.00 | The role of the Arbiter<br>Dr. Reno Borg,<br>Financial Arbiter, Office of the Arbiter for Financial Services   |
| 10.30 | Panel discussion - Avoiding the classic mistakes investors often make<br>Mr Jesmond Mizzi, Jesmond Mizzi Financial Services<br>Mr Patrick Debattista, RSM Malta<br>Mr Stephen Borg, Calamatta Cuschieri<br>Ms Oriana Abela, Grant Thornton<br>Moderated by Mr Joseph Portelli,<br>Chairman, Malta Stock Exchange |
| 11.00 | Coffee break   |
| 11.30 | How do REITs work?<br>Mr Stephen Borg, Calamatta Cuschieri   |
| 12.00 | How to value companies<br>Mr Patrick Debattista, RSM Malta   |
| 12.30 | The difference between investing in ETFs and funds<br>Mr Gabriel Mansueto, Jesmond Mizzi Financial Services  |
| 13.00 | Panel discussion - How to build an investment portfolio<br>Mr Jesmond Mizzi, Jesmond Mizzi Financial Services<br>Mr Patrick Debattista, RSM Malta<br>Mr Stephen Borg, Calamatta Cuschieri<br>Ms Oriana Abela, Grant Thornton<br>Moderated by Simon Zammit, CEO, Malta Stock Exchange                             |
| 13.30 | Closing remarks<br>Mr Joseph Portelli  |

A fee of €10 per person will apply.

# Registration Form

Name & Surname

Address

E-mail

Contact Number

Payment of €10 is to be made by bank transfer to MSE Institute  
IBAN number MT04VALL22013000000040025119059  
quoting the attendee name and followed by email to [msei@borzamalta.com.mt](mailto:msei@borzamalta.com.mt)  
or by cheque in favour of Malta Stock Exchange Institute.

Bank

Cheque Number

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## Prof. Edward Scicluna

### Hon. Minister for Finance

During 2013, Prof. Scicluna assumed the chairmanship of the European Investment Bank Board of Governors (EIB) and vice-chairmanship of the European Bank for Reconstruction and Development (EBRD). Prior to March

2013 he served as a member of the European Parliament (MEP), in the capacity of Vice-Chair of the Economic and Monetary Affairs Committee (ECON) and a member of the European Statistical Advisory Committee (ESAC). Previous appointments include that of Professor and Head of the Department of Economics at the University of Malta, Chairman of the Malta Financial Services Authority, Chairman of the Malta Council of Economic and Social Development, Board Director of the Central Bank of Malta and Electoral Commissioner. Prof. Scicluna graduated from the University of Oxford with a Diploma with distinction in politics and economics, from the University of Malta with a First Class Honours BA degree in Economics and the University of Toronto with a Masters and Doctorate in Economics.



## Dr Reno Borg

Dr Reno Borg was a practising lawyer at the Maltese Courts for more than thirty three years. Throughout the years, Dr Borg worked at the Office of the Prime Minister and at the Attorney General's Office. He served in diplomacy as Head of the Malta Delegation to OSCE in various conferences and also represented Malta at the Law of the Sea Conference in Geneva. Dr Borg advised various national corporations and the main banks in Malta. He also acted as Chairman of one of Malta's major Banks and also a leading life insurance company. Dr Borg also served as a Member on the Board of the Malta Broadcasting Authority and various other Boards. He lectures the law of civil procedure at the University of Malta. He also held the office of Arbiter under the Social Security Act and was appointed as Malta's first Arbiter for Financial Services in 2016.



## Joseph Cuschieri

Joseph Cuschieri, Chief Executive Officer of the MFSA, is responsible for the overall management and performance of the Authority, strategy development/ implementation including reforms in the financial services sector. A Certified Public Accountant by profession and a fellow member of the Malta Institute of Accountants, Mr Cuschieri is specialised in management accounting, corporate finance, economic regulation and general/

business management. He also holds a Masters Degree in Business Administration from Henley Management College, UK and an Advanced Diploma in Management Accounting from the Chartered Institute of Management Accountants (CIMA), UK. Throughout his professional career spanning 25 years, he held various finance related roles, senior executive positions and directorships within the private and public sector amongst which Head of Corporate Affairs and then Chief Commercial Officer at Vodafone Malta, Chief Operating Officer at the Malta Communications Authority, senior consultant with EY and prior to joining the MFSA he held the position of Chairman and CEO at the Malta Gaming Authority since November 2013.



## Simon Zammit

Simon Zammit is the CEO at the Malta Stock Exchange where he joined back 1991 during the setting up stage of the Exchange. Over the years he has managed various departments including the Central Securities Depository, the Data Operations and IT as well as spearheaded a number of the Exchange's major projects. These included the implementation of the various transitions in the electronic and remote

trading projects undergone by the Exchange. Simon is a Member of the Institute for the Management of Information Systems and holds an MBA from Henley Management College.



## Gabriel Mansueto

Gabriel Mansueto has been working within the financial services sector for the past 10 years and is Head of Investment Advisors at Jesmond Mizzi Financial Advisors Limited. His areas of specialisation include providing investment advice on fixed income and multi-asset investing. He graduated with an honours degree in Economics in 2009 and later completed a Master's degree in Banking & Finance from the University of Malta.



## Joseph Portelli

Joseph Portelli has over 32 years' experience employed in various capacities within the financial industry in the U.S and in Malta. He has vast experience as a portfolio manager, currency and commodity trader and has been employed with Bank of America, Nomura Securities, Goldman Sachs, Millburn Ridgefield, Global Capital, and Liongate Capital Management. His most recent position was chief investment

officer and managing director of FMG Funds, an emerging markets specialist. He is currently Chairman of the Malta Stock Exchange and sits on its Audit Committee. Between April 2013 and April 2015 he sat on its board and chaired its Risk Management Committee. He is also Chairman of the Financial Literacy Board focused on improving financial literacy in Malta consisting of Malta Stock Exchange and Ministry of Education members. He is principal of Risk Compliance Ltd a company which services the fund industry in various capacities focusing primarily on risk management, compliance and directorship services.



## Stephen Borg

Stephen Borg is the Head of Wealth and Fund Management at Calamatta Cuschieri. Prior to joining Calamatta Cuschieri, Mr Borg was Head of Portfolio Management Services at Bank of Valletta plc, where he was responsible for the bank's high net worth clients. In his role, he assisted in the development and implementation of the bank's strategy in the area of Wealth Management while enhancing the risk and compliance aspects of the portfolios under management. Stephen has over 18 years experience in the industry and holds a Bachelor of Commerce with Honours in Banking & Finance from the University of Malta.



## Jesmond Mizzi

Jesmond Mizzi has been involved in the financial services industry for over 23 years. He is the Managing Director of Jesmond Mizzi Financial Advisors Limited, a Director of Merrill Sicav plc and a non-Executive Director of Hill Ventures Limited. He is also a business columnist on The Times and The Sunday Times, and a regular guest on educational and financial media programmes.



## Oriana Abela

Oriana is a Director at Grant Thornton engaged in the Transaction Advisory Services, a department specialising in corporate finance. She holds an honours degree in Accountancy from the University of Malta and is also ACCA qualified. In 2013, Oriana graduated from the University of Wales with distinction obtaining a Master in Finance, specialising in Mergers and Acquisitions. As a Director at Grant Thornton, Oriana leads capital markets

and due diligences. Through Prospects MTF, a multi-trading facility of the Malta Stock Exchange, Oriana has raised a total of €31 million for Orion Finance plc, Kliik Finance plc, AST Group plc, AgriHoldings plc, Luxury Living Finance plc, D Shopping Malls plc, and FES Finance plc. With respect to the due diligences, Oriana managed several buy-side and sell-side due diligence for clients operating in the telecommunications industry, banking/stock broking industry, real estate industry, automobile industry and transportation industry. Oriana has also managed cross-border due diligences, both when foreign companies acquired Maltese companies, as well as a foreign companies during her secondment in Milan.



## Patrick Debattista

Patrick Debattista is a Senior Manager in Business Advisory at RSM Malta. He has ten years of experience working in Transaction Services, Investment Management and Taxation. He worked as an Associate at an international private equity group, where he was involved in overseeing its investment activities; from sourcing potential targets to undertaking financial and other due diligence. Patrick previously worked in the Financial Advisory Services team at a Big Four firm,

specialising mainly in corporate valuations, financial due diligence and business modelling. He was also Direct Taxation Manager at a mid-tier firm. Patrick is a CFA charterholder and a Certified Public Accountant (CPA). He holds an Executive Master's degree in Financial Analysis from the University Carlos III in Madrid. Patrick is a visiting lecturer at the University of Malta and Business Leaders Malta.



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