



Portfolio Day & Dinner 2026

Formerly known as Fondsevent
19th edition, Monday 28 September
Spant! Bussum, Netherlands

Publisher's note

Dear partners and valued contacts,

In 2026, Investment Officer will proudly host the **eighteenth edition** of our flagship event – dedicated to exploring economic and geopolitical trends and their impact on asset allocation: *Portfolio Day*.

Formerly known as *Fondsevent* and long recognised as a leading platform for industry dialogue and collaboration, the event now better reflects our promise to the audience and aligns with our Belgian counterpart in Brussels — this year marking the fifth edition of *Portfolio Day*.

Our goal is to bring together key decision-makers and influencers from major banks, private banks, insurers, family offices, and independent wealth managers. We aim to inspire them with journalistic insights into the issues that shape their daily decisions — helping them make better-informed choices the very next day. Not in a conventional way, but through a modern and dynamic programme filled with fresh ideas.

The programme is developed in close collaboration with leading banks, private banks, and major wealth managers to ensure alignment with industry priorities and strong participation from senior representatives. Its independent editorial approach guarantees objective, relevant, and high-quality insights for all attendees. Part of the concept includes an invitation-only dinner for decision-makers following the daytime event.

Portfolio Day and Dinner comprises a full-day conference and an exclusive evening session, providing tailored opportunities for engagement, knowledge exchange, and networking.

This document presents the event concept and outlines the benefits for our partners. We look forward to exploring how we can work together to make *Portfolio Day and Dinner* a great success.

Kind regards,

Jasper Staring

Publisher

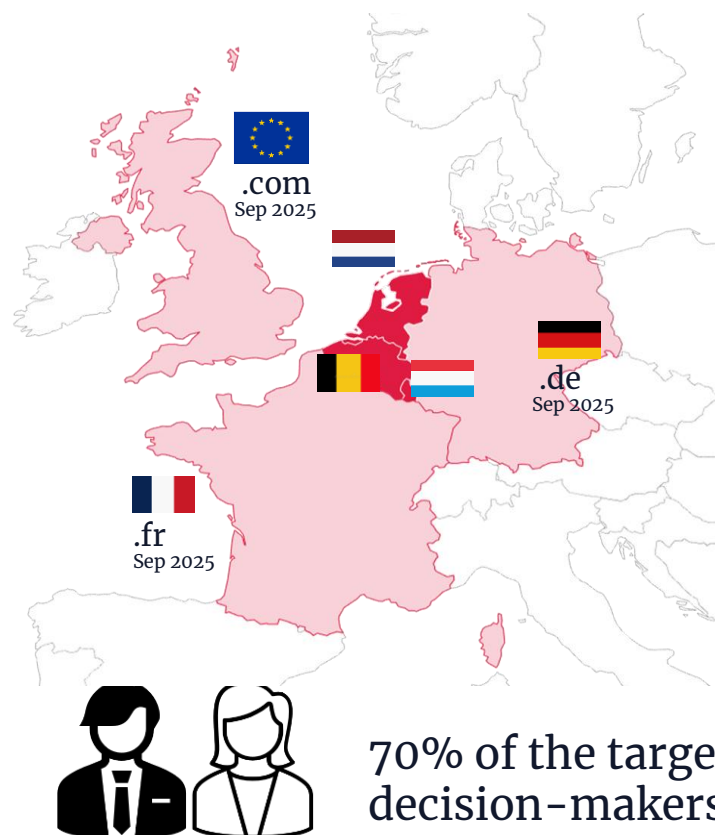
About us

Investment Officer is the leading journalistic platform in the Benelux, providing high-quality information, analysis, and insights tailored for decision-makers at major banks, private banks, insurers, and independent wealth managers in the investment industry.

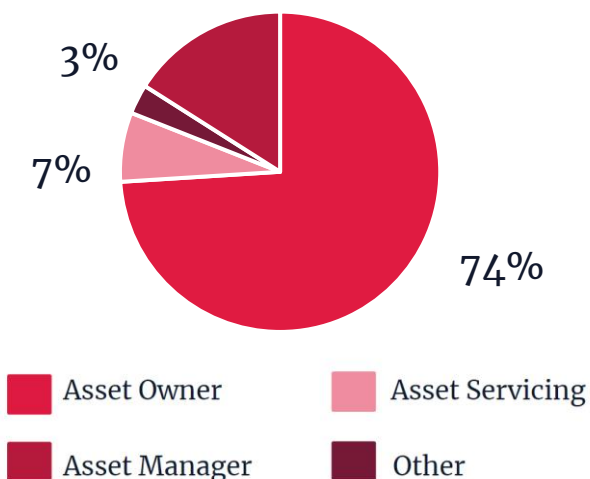
Investment Officer is part of FD Mediagroep, which also owns Het Financieele Dagblad, BNR Nieuwsradio, and international trade publications such as IPE and Impact Investor. We are Proudly B Corp certified.

With the launch of our German, French, and international (.com) editions in September, we are expanding to become a leading pan-European publisher.

Subscribers in the Benelux:
18,000+



Subscribers in the Netherlands: 11,000+



70% of the target audience consists of decision-makers and influencers

Our events

Our events are different from traditional trade fairs. Instead of booths, we try to create an inspiring environment focused on **thought leadership**. This is the signature experience you can expect from Investment Officer events and gatherings.

The program, designed for genuine interest, includes high-level insights crafted by our independent editorial team, alongside contributions from our partners and their experts. Throughout, we provide informal opportunities to connect.

We maintain a strict admission policy to ensure the right people meet, excluding competitors of our partners. While the investment in these events may sometimes be slightly higher, they provide significant added value in return.



Our events

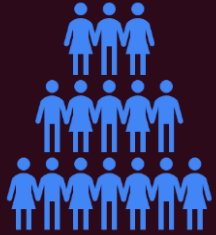
We believe in creating **meaningful connections**—not only among our visitors, who have the opportunity to meet their peers, but also between our partners and visitors. Our aim is to bring people together to engage in discussions, centered around the core content of the event.

We also believe that an event is **not just a 'one-off.'** With our event partners, we create branded articles that highlight the topics or themes they wish to showcase during the event. This way, the event becomes part of a larger content strategy rather than standing alone.

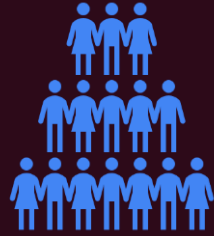
The same philosophy applies to our editorial team; they consider events as a rich source of content as well.



Evaluation 2025



180 event
participants
(incl. partners)



36 dinner guests
(excl. partners)

100%

buy side



8,5

Average rating



80%

Would
recommend to a
colleague



82%

Will join next year
(18% 'don't know
yet')

Source: survey Investment Officer N=35

Portfolio Day and Dinner 2026

The day program targets professionals in advisory roles at major banks, private banks, insurers, and independent wealth managers, with 150+ expected guests. We anticipate 35 guests at the dinner (excl. partners).

We intend Portfolio Day will take place at theatre and conference centre Spant! in Bussum (easily accessible by both public transport and car), produced by an experienced team with local market expertise, a network of decision-makers at distribution organisations, and a proven track record in similar events (we work with event team of Het Financieele Dagblad and IPE). The dinner will take place at Fier, next to Spant!



The daytime program is structured into three key components



1. Plenary Sessions
2. Investment Square & Deep Dives
3. Networking Opportunities

The plenary sessions are produced under the responsibility of the Investment Officer editorial team



1.1 Opening Session

Addresses major themes, trends, and developments, exploring their potential impact on investment strategies.

Guests include free-thinking experts, well-known columnists from IO, and editorially invited speakers.

The plenary sessions are produced under the responsibility of the Investment Officer editorial team



1.2. CIO Insights

Brings together CIOs and senior investment strategists from leading distribution organisations in the Netherlands to share insights, debate strategies, and reflect on current trends.

The participants are key decision-makers with extensive experience in portfolio management and strategic investment decisions.

The plenary sessions are produced under the responsibility of the Investment Officer editorial team



1.3. Keynote

We end the day with an inspirational keynote, serving as a conversation starter for the networking reception.

Connect with
leading experts,
exchange ideas,
and build
meaningful
relationships



2. Investment Square

At Investment Square, attendees have the opportunity to connect with leading experts from major investment firms partnering with the event. These experts take part in discussions with small groups of 8 to 10 participants, sharing valuable knowledge and insights. Each session lasts 25 minutes, including 5 minutes for transition time, and is designed to foster meaningful connections that partners can follow up on after the event. We provide a scanning device to scan QR codes from table attendees, ensuring you know exactly who participated in your session.

There are a total of 4 sessions of 25 minutes each, reaching approximately **401-on-1 contacts** in two hours.

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2. Deep Dives

For partners who wish to share ideas and insights, but may not feel comfortable hosting a roundtable, we offer Deep Dives — small breakout sessions held alongside Investment Square. These sessions are particularly suitable for international speakers who prefer to give an inspiring presentation rather than lead a roundtable discussion.

We provide a scanning device to scan QR codes from session attendees, ensuring you know exactly who participated in your session.

There are a total of 2 sessions of 40 minutes each, reaching approximately 40 contacts in two hours.

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Networking Opportunities

Multiple opportunities to connect throughout the event, including during lunch, at the Investment Square, during the reception and dinner, facilitating valuable peer-to-peer interaction. We end the day with a decision-makers' dinner



Dinner

Investment Officer invites, on a 'by invitation only' basis, decision-makers from the distribution side of the industry, together with the partners of Portfolio Day & Dinner. Each partner receives two tickets, and all guests are personally invited by Investment Officer. We expect around 35 invited guests, in addition to representatives from our partners.

The evening begins with an informal reception, where guests can gather and enjoy a drink. This is followed by a seated dinner, opening with a short keynote (approximately 20 minutes). The dinner concludes with a standing dessert buffet and coffee, creating multiple opportunities for interaction beyond one's table guests.

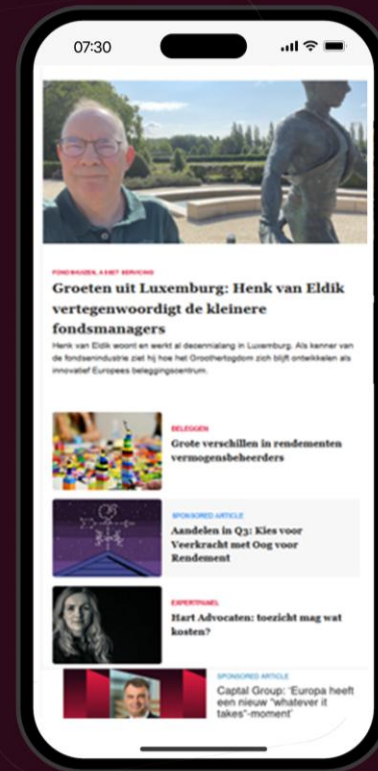
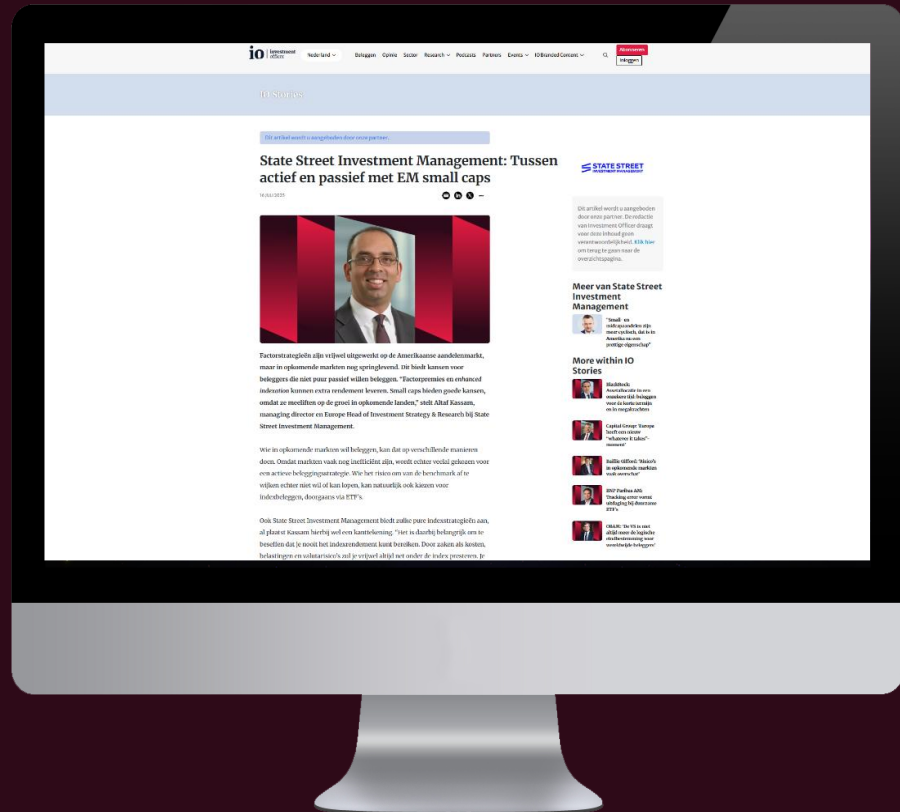
A seating arrangement will be provided, and partners are welcome to suggest preferred placements (no guarantees).



Global outline daytime schedule

Time	Subject
DAY	
12PM	Arrival and networking lunch
1PM	Plenary session I– Opening session
2PM	Sharing Investment Ideas at Investment Square & Deepdives
2:45PM	Networking break
3:15PM	Sharing Investment Ideas at Investment Square & Deepdives
4PM	Plenary session II– Keynote & Wrap-up
5PM	Networking Drinks
6PM	End
DINNER	
6PM	Apperitive
6:45PM	Dinner
9:30PM	End

Brand Story



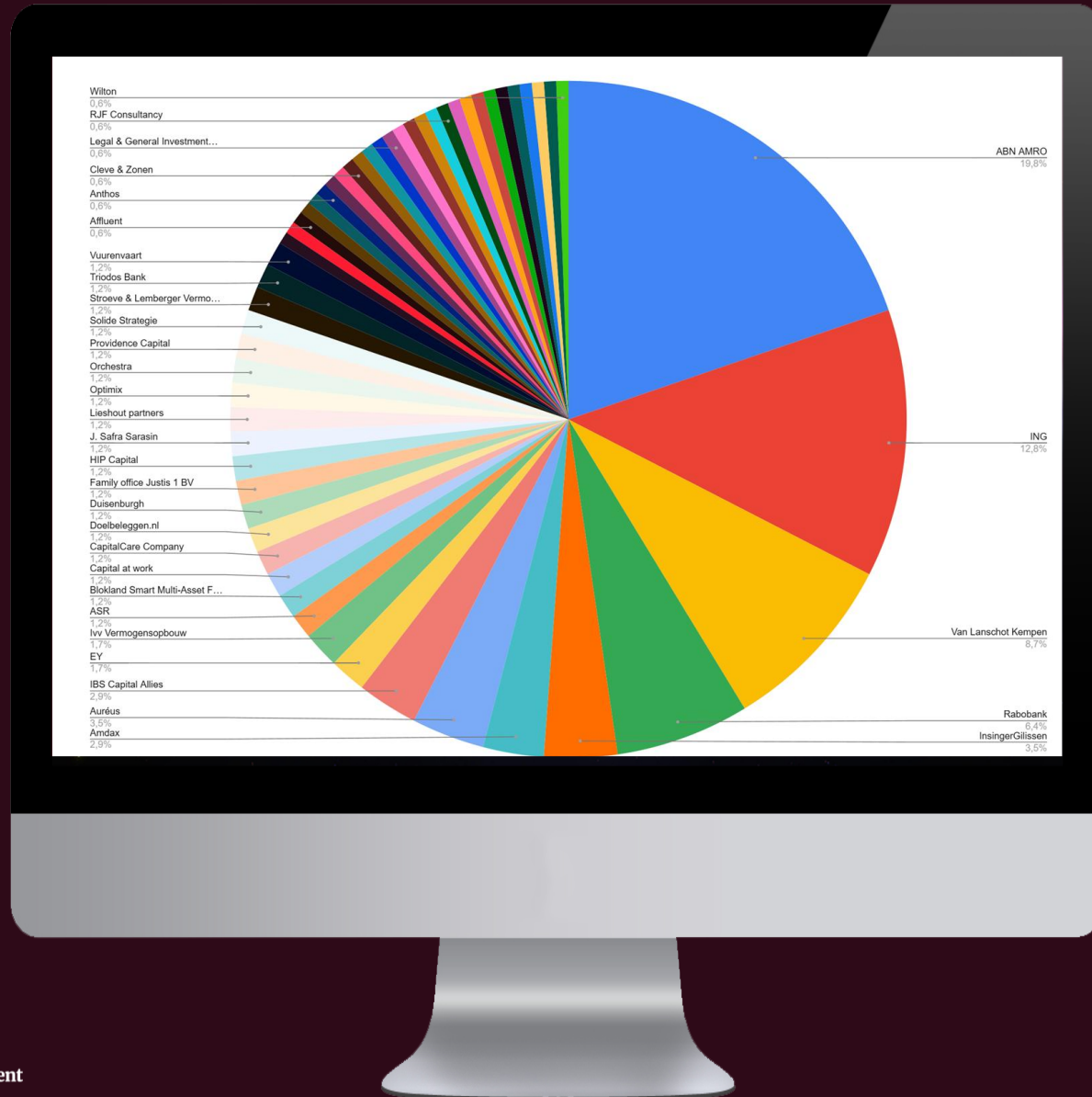
An event is never just a one-off. Your story will be shared with our audience and promoted before and after the event, across our platforms—web, app, and newsletters.

The brand story is created in collaboration with a specialised journalist from Investment Officer (separate from the editorial team).

It is based on an interview with your expert, from which the journalist will develop the narrative. You'll have two feedback rounds to refine and optimise the story.

In addition, this brand story can be re-used and shared through your own channels.

Evaluation



KPI based: ROMI (Return On Marketing Investment)

- Visitors
- Average rating
- Article reads
- Touchpoints
- Contacts
- Costs per contact & costs per touchpoint

Partner benefits

Engagement

- 2 tickets for daytime program,
- 2 tickets for 'by invitation only' dinner.
- Expert table at Investment Square or Deepdive to share insights
- Branded article /tailored interview with partner expert published & promoted on:
 - IO.nl/ IO App,
 - IO Newsletters to Netherlands audience,
 - LinkedInwith a minimum guarantee of 70 unique article reads

Brand Exposure

- Brand visibility in all promotional and event communications.

Lead Generation

- Access to attendee lead list and expert table participants (including email addresses).
- Visitors of tables and deep dives can be scanned by host of table/ deep dive.

Professional Support & ROI

- Guidance from a dedicated professional team.
- Clear goals, comprehensive evaluation, and ROI reporting.

Investment details

Premium Partnership

€ 26,500 for participants also involved in the Partner Programme* in BENELUX or previous event partners.

Event Partnership

€29,500 for new participants.

Commercial terms & conditions

- Limited to 12 partners, ensuring exclusivity.
- The concept can be delivered with a minimum of 9 partners.
- We work with the principle '*first come, first serve*'.
- Partners from previous editions and Partner Programme* will be given priority.
- Deadline to participate is **February 15, 2026**.
- Amounts are ex VAT.



