

# Investment Solutions Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

How can you kick-start revenues for 2017?

- How can you make money over the next 12 months?
- What investment solutions are best suited to today's environment? What makes sense for the next 6 months?
- How can we shift the focus towards products which are actually saleable and scalable?
- How do you get clients to focus on, and invest in, ideas that are right for them in the current environment?
- What are the KPIs for RMs? Do they even know what they are? And have they been clearly defined by senior management?
- How can we encourage more needs-based conversations with clients, and create outcome-focused portfolios?
- What should asset managers, investment banks and other product manufacturers do to help distributors address the issues they face in delivering the right product, content and support to clients?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

Speaker

Lavanya Chari  
Managing Director, Head of Global Products and Solutions, Asia Pacific  
Deutsche Bank Wealth Management

Michael Levin  
Head of Asset Management, Asia Pacific  
Credit Suisse Asset Management

Ian MacDonald  
Director, Financial Services - Advisory  
EY

Marco Kermaidic  
Chief Operating Officer  
BNP Paribas Wealth Management

9.45am Presentation

How can you kick-start revenues for 2017?

Robert Reid  
Chief Operating Officer and Head of Strategy, Asia Pacific  
BlackRock

- Tighter regulations; narrowing profit margins; risk-shy yet performance seeking clients. The Asian wealth industry has never been more challenging – nor has it offered more opportunity
- How can we increase the scope of our investment universe? How can we evolve our businesses and products to keep pace with client demands?
- Join us for a presentation on the key themes that we are seeing in the wealth industry and how investors are pushing beyond the inflection point in markets

10.00am

Presentation  
Old bank, new bank

Frank Troise  
Managing Director, Head of Digital Distribution (Asia)  
Leonteq

- Who will be the winners from digitalisation?
- Digitising investment solutions

10.15am

Refreshment & Networking

10.45am

Panel Discussion

Is DPM the answer?

- What's the potential for DPM to grow in Asia amid the more challenging environment currently?
- How can banks really make DPM offerings work?
- To what extent do we need dedicated programmes to deliver a specific solution, and run by a DPM team following efficient, structured processes?
- What is the role now for funds in portfolio construction?

Chair

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Speaker

Sean Cochran  
Managing Director, Head IPS Portfolio Specialists APAC  
UBS Global Wealth Management

Kevin Liem  
Managing Director  
Masan Capital

Jaye Chiu  
Head of Investment  
EFG International

Anthony J. Harper

11.25am

Presentation  
Robo-advice disrupts fund selection

Matthias Weber  
Partner and Chief Investment Officer  
ifund

- How structured due diligence data enables robo-advice
- Standardised fund profiles to ensure suitability
- Live-demo of a client-centric robo-adviser for fund selection

11.40am

Presentation  
Hail the elephant; the value of Asian bonds

Boon Peng Ooi  
Chief Investment Officer, Fixed Income  
Eastspring Investments

- The state of the Asian bond market; market capitalisation growth, credit stability, yield
- The prospects for Federal Reserve and major central bank policies – and the impact on Asian bond markets
- The value of Asian bonds in a low-yield world

11.55am

Presentation  
NEW NORMS in 2016: No more macro consensus trades, yield junkies & monetary policy exhaustion

Andrew Scott  
Head of Flow Strategy & Solutions, Asia Pacific  
Societe Generale

- A global review of H1: a year of misfiring central bankers, failing macro consensus trades and unresolved political questions
- A quick review of the confusing Asian investing landscape
- An overview of the insatiable demand for yield and the Asian consequences

12.10pm

Panel Discussion

Finding value in China

- How can investors get access to the China growth story?
- What is the best vehicle for this?
- Which sectors or asset classes in China will do best over the next 6 months? And the next 3 to 5 years? And why?
- Passive or active – what's best for getting the most out of the opportunity in China?
- Where proportion of exposure to China should investors have within their overall portfolio?

Chair

Michael Stanhope  
Founder & Chief Executive Officer  
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Speaker

Belle Liang  
Head of Investment Advisory, Investment Services Division  
Hang Seng Private Banking

Stewart Aldcroft

Langley Castle Consulting

Jackie Choy  
Director-ETF Research, Asia  
Morningstar

Stephen Kam  
Senior Product Specialist, Equities  
HSBC Global Asset Management

12.45pm

Lunch & Networking

1.30pm

Panel Discussion

Expanding the role of alternatives in portfolios

- What is driving increased appetite for alternatives?
- What do clients want, and why?
- How do we make private deals accessible to HNW and mass affluent clients?
- How can we offer the private equity product to private banking clients?
- Where should real estate fit over the coming years?
- What is the role now for alternatives in portfolio construction?
- How can investors be creative going forward?

Chair

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Founder & Chief Executive Officer  
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Speaker

Richard Mak  
Managing Director, Head of Asia Advisory  
Pictet

Anthony Siau  
Managing Partner  
Kairos Capital Partners

Steve Knabl  
Chief Operating Officer & Managing Partner  
Swiss-Asia Financial Services

Jessica Cutrera  
Founding Partner, Managing Director

EXS Capital

Chetan Pandya  
Senior Vice President, Business Head - FT Grid  
Intellect Design Arena

2.10pm

Presentation  
Vietnam: the rising dragon

Andreas Vogelsanger  
Chief Executive Officer  
AFC Vietnam Fund

- Economic outlook for 2016
- Foreign investment trends
- TPP, ASEAN Economic Community

2.20pm

Presentation  
What IF an Uber Wealth was born?

Chetan Pandya  
Senior Vice President  
Intellect Design Arena

- The promise of digital in context of wealth management
- Digital wealth – elements for innovation and transformation
- From wealth management to returns management
- From relationship management to assisted advisory
- The ultimate digital tool-kit

2.35pm

Presentation  
Managing investment risk: challenges and opportunities

Harold Kim  
Founder and Chief Executive Officer  
Neo Risk Investment Advisors

- The challenge of managing investment risk has increased
- A focus on dynamically managing risk can greatly improve returns
- We illustrate using an example of an Asian equity portfolio

2.55pm

Presentation  
Removing the funds penetration blockage

Andrew Hendry  
Managing Director, Asia  
Westoun Advisors

- What are the challenges to greater funds penetration in Asia?
- What are the best practices among fund gatekeepers?
- How to open the funds funnel a bit wider

3.05pm

Presentation

Getting onto a bank's funds distribution platform

Stewart Aldcroft

Langley Castle Consulting

- The 4Ps of fund distribution
- Platform approval process
- Why retail distribution in Asia has become more difficult

3.20pm

Refreshment & Networking

3.45pm

Panel Discussion

Driving scalability and diversification in structured investment solutions

- How should you use structured products in today's environment?
- What can investors do to try and be as insulated as possible from directional moves?
- How can structured investments can really add value to investors via simple strategies?
- Is now the time for principal-protected, longer-dated products?
- Where should portfolios be building in some capital protection and building up the yield?
- How to address typical objections and myths around structured products? (Such as being too risky, too complicated, opaque, only for short-term tactical use, etc)
- Fund derivatives – where can you find value this year?
- How can you manage downside risk and keep optionality in the portfolio? To participate in directional moves in the market

Chair

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Speaker

Adam Cowperthwaite

Head of Markets, Citi Global Wealth APAC  
Citi Private Bank

Harold Kim

Founder and Chief Executive Officer  
Neo Risk Investment Advisors

Rohit Jaisingh

Head, Equity Investment Products  
DBS Bank

Philippe Banon

Director, Head of Sales, Global Equity Linked Products, APAC  
RBC Capital Markets

Ni Yan

Senior Advisor Sales Trader of Structured Products  
Lombard Odier

Lemuel Lee  
Head of Equities, Asia  
J.P. Morgan Private Bank

4.25pm

Panel Discussion

CIO debate – how can you create robust portfolios for YOUR clients?

- Where are we heading in the last quarter of 2016?
- What are the rational investment opportunities in challenging market conditions?
- How can investors successfully balance risk and return in today's uncertain investment landscape?
- Where do you invest if rates go negative?
- What should be the new benchmarks for investing?
- How do we position portfolios for the long-term given so much uncertainty and volatility?
- What are the biggest risks for the rest of 2016 and into 2017?
- Risk management is key – but how can we get it right?

Chair

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Speaker

Jean-Louis Nakamura  
Chief Investment Officer, Asia Pacific - Chief Executive Officer, Hong Kong  
Lombard Odier

Ken Peng  
Asia Pacific Investment Strategist  
Citi Private Bank

Steven Moeller  
Managing Director, Head of Multi-Asset Asia Pacific  
BlackRock

5.05pm

Forum Ends