

# Investment Solutions Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope  
Founder & Chief Executive Officer  
Hubbis

9.05am Panel Discussion

Reengineering the offering: products and platform

- What does it mean today to 'add value' to a client?
- What do you need from your investment platform? How is that changing?
- How will you grow your platform in the next few years?
- Can a digital approach be innovative for the investment engine? Is it possible to deliver 'digital' advice?
- Should we be using AI / data / robo? Can it enhance the ability to make better investment decisions?
- To what extent do you see new firms – possibly digital - disrupting your business?
- Impact of key business trends like passive investments, fees and transparency?
- You had a great year in 2017. What's your revenue replacement strategy for the next two years? Is there a likelihood you will see outflows 2H this year?
- How important is 'credit' risk today? And other risk? How do you manage it?
- Where will net new assets (NNA) come from?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel Members

Speaker

Harold Kim  
Founder and Chief Executive Officer  
Neo Risk Investment Advisors

Sandro Dorigo  
Business Development Head  
Leonteq

Rohit Jaisingh  
Head, Equity Investment Products  
DBS Bank

Malik S. Sarwar  
CEO  
K2 Leaders

John Robson  
Chief Commercial Officer  
Quantifeed

Lemuel Lee  
Managing Director, Head of Wealth Management Hong Kong  
BNP Paribas Wealth Management

9.55am

Presentation  
Emerging markets, the end of the goldilocks scenario?

Delphine Arrighi  
EMD Porfolito Manager / Fund Manager  
Merian Global Investors

- Fundamentals remain strong in EM as all have adjusted from their pre-taper tantrum imbalances
- But the external environment has become more challenging
- Yet un-discriminated re-pricing across the asset class seems overdone and creates value

10.05am

Presentation  
Investing in China today

Denis Gould  
Chief Investment Officer, Multi Asset and Wealth  
HSBC Global Asset Management

- China economic outlook - growing in a more sustainable way
- Deleveraging is working out in China
- Does trade war matter?
- Investing in China with a multi-asset way
- HSBC China Multi-Asset Income Fund

10.15am

Panel Discussion

Discretionary Portfolio Management and Advice-led

- Advice vs discretionary – what's best?
- How are you working with third-party partners?
- How can you differentiate your DPM offering? To what extent can you be innovative?
- Given more challenging market conditions – is advice more important than ever?
- Do Asian clients still have a strong desire to retain control? How do you deal with that?
- Opportunities of key market mega-trends like millennials, baby boomers, women empowerment, ESG, SRI. How are you capitalising on these?
- When a client gives you an active advisory mandate – what are their expectations?
- Do Asian clients have unrealistic expectations for higher risk-adjusted returns? Or less so today?
- How do we provide any real intellectual insights?

Chair

Malik Sarwar  
CEO  
K2 Leaders

Panel Members

Speaker

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

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Axial Partners

Vincent Ng  
Joint-Chief Investment Officer, Wealth Management, Asia ex-Japan  
Nomura

Grizelda Lee  
Head of Asset Management Asia, Public Markets Solutions  
Indosuez Wealth Management

Peter Dietrich  
Head of Sales, Indexes  
Morningstar

11.00am Refreshment & Networking

11.35am Presentation  
Emerging Trends in Portfolio Advisory

Andrew Tong  
Executive Director & Head of Greater China Consulting  
MSCI

- Systematic approach to discussing market scenarios
- Handling of structured products
- Address questions on impact and sustainability of product ideas

11.45am Presentation  
ETF Lightning Round: 20 questions in 10 minutes, everything you need to know about  
ETFs

Rebecca Sin  
Head of ETF Sales Trading, Asia Pacific  
Commerzbank

- Should I use ETFs?
- Am I selecting the right ETF?
- How to get the best prices on ETF?
- What are popular ETFs that investors are using?
- Are there advantages of trading US vs Europe vs Asian based ETFs?
- What are the risks with trading ETFs during Asian hours?
- How to evaluate liquidity?
- Myths on trading EM and Fixed Income ETFs
- Why and what are UCITS ETFs

11.55am Presentation  
VIETNAM: Asia's Last Tiger Emerging

Kevin Snowball  
Chief Executive Officer & Chief Investment Officer  
PXP Vietnam Asset Management

- Building on macroeconomic success, as GDP growth drives earnings
- Market pullback & consolidation after 4Q 2017/ 1Q 2018 surge building a solid base for a renewed advance
- Government focus on fulfilling criteria MSCI for Emerging Market re-designation likely to catalyse a move to new highs

12.05pm

Panel Discussion

Engaging the client. Selecting the best products. Getting better outcomes.

- How are clients engaging managed investments in 2018? Trends and developments?
- How do we select the best funds and products?
- How can we optimise the clients existing portfolios?
- What are the benefits of a managed account platform?
- Is it possible to deliver digital advice? Whats the role of technology?
- Is there a role for robo / AI – to improve the process and get a better outcome?
- What are the clients expectations today?
- How do we personalise the approach to each client?
- Does a multi-manager approach using the best-of-breed managers help deliver consistent performance over time, particularly during volatile periods?
- Do manager allocations within a portfolio need to be actively managed to adapt to changing market conditions?

Chair

Michael Stanhope

Chief Executive Officer & Founder  
Hubbis

Panel Members

Speaker

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

Kevin Liem  
Chief Investment Officer  
CBH Asia

Arjan de Boer  
Head of Markets, Investments & Structuring, Asia  
Indosuez Wealth Management

Tariq Dennison  
Wealth Manager, US-Asia  
GFM Asset Management

Matthew Chan  
Senior Consultant  
Mercer

12.50pm

Presentation

Investment solutions from Asia's robo-platform providers

John Robson  
Chief Commercial Officer  
Quantifeed

- Theme-based Investing: thematic portfolios accessing big ideas
- Risk-based Investing: sensible investing delivered simply
- Goal-based Investing: engaging with customers for the long haul

1.00pm

Lunch & Networking

1.50pm

Room A – Workshop

Managed Accounts in Asia

Managed accounts are one of the largest and fastest growing segments of the wealth management market globally, eclipsing \$5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

Anthony J. Harper  
Chief Executive Officer and Co-Founder  
Axial Partners

1.50pm

Room B – Workshop

Emerging markets, the end of the goldilocks scenario?

Emerging market debts were one of the best performing asset class in 2017. However, this year so far, the external environment has become more challenging and the Turkey's crisis has led to concerns over the outlook of the asset class. Is it the end of the goldilocks scenario? Delphine Arrighi, EMD fund manager, will share with the audience opportunities and risks presented by the asset class.

- Fundamentals remain strong in EM as all have adjusted from their pre-taper tantrum imbalances
- The un-discriminated re-pricing across the asset class seems overdone and creates value
- Fundamental analysis remains key in times of stress
- Active trading and separate FX overlays to hedge global risk
- New frontier markets remain a key source of revenue generation and diversification

Delphine Arrighi  
EMD Portfolio Manager / Fund Manager  
Merian Global Investors

2.30pm

Room A – Workshop

Demystifying structured products

- How structured product works

- Factors affecting the product price
- Liquidity and valuation on secondary market
- Common misconceptions

Chinmay Patil  
Executive Director, Investment Solutions  
Leonteq

2.30pm

Room B – Workshop

Investing for the Long Term: Portfolio allocation and managing investment risk

We discuss the challenge of investing for the long-term, which starts with clearly defining the goals of an investor. We consider the various investment options available, specifically in the context of return, risk and correlation characteristics. We then outline the process for portfolio allocation among the investment options, focusing on the issues of implementation in the real world, where returns are difficult to forecast and risk varies continuously.

- Investing goals
- Return, risk and correlation
- Portfolio allocation
- Managing investment risk

Harold Kim  
Founder and Chief Executive Officer  
Neo Risk Investment Advisors

3.10pm

Refreshment & Networking

3.30pm

Panel Discussion

Capital Markets & Structured Products – what can we expect in 2H 2018?

- After the mega structured products bonanza in 2017 – what can we expect in 2H 2018?
- Given where we are – what are some of the best ideas to discuss with clients?
- What strategies will enable Asian investors get higher returns, whilst been mindful of potential market challenges?
- Which assets do clients want? What's the best way to source and deliver on this?
- How can you optimise a client's existing portfolio – is this a priority?
- Any role for passive and index products?
- How can investors be creative in generating yield?
- How should clients now view their risk?
- What are the key drivers of excess return – sources of alpha – in each asset class? How can they help add to overall performance?
- How can HNW clients take advantage of rising volatility?

Chair

Michael Stanhope  
Chief Executive Officer & Founder  
Hubbis

Panel Members

Speaker

Ni Yan  
Head of Structured Products Asia  
Indosuez Wealth Management

Chinmay Patil  
Executive Director, Investment Solutions  
Leonteq

Lincoln Chow  
Director, Head of Sales, Hong Kong & Singapore, Financial Institutions Marketing  
Commerzbank

Edward Liu  
Head of Investment Counselling  
EFG International

4.15pm

Panel Discussion

Relevant Investment ideas to discuss with clients today

- What are the main investment themes and the products that will be most relevant in 2H?
- How will you help clients shift mindset, investing style and portfolio holdings as the market transitions to a more volatile phase?
- Do frontier markets like Vietnam offer a viable investment opportunity today?
- What are some of the more interesting private equity opportunities today? How do clients access these opportunities?
- What is your current thinking about the role of fixed income and credit in HNW / UHNW clients' portfolios?
- Structured products to discuss with clients given current market conditions?
- When investing in credit - investors have for the last 8-10 years been rewarded for keeping liquidity and going down in credit quality. Is this still a smart thing to do?
- Equities: Thematic equities have received a lot of hype – some good / some bad. Whats the best way to find alpha and non-correlated returns?
- Equity – where is best? Where is worst?

Chair

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Chief Executive Officer & Founder  
Hubbis

Panel Members

Speaker

Nicholas Hulme  
Chief Executive Officer  
Contineo

Kevin Snowball  
Chief Executive Officer & Chief Investment Officer  
PXP Vietnam Asset Management

Christina Kautzky  
Head of Distribution for Asset Management in Non-Japan Asia  
Credit Suisse Asset Management

Karim Ghannam  
Co-Founder & Chief Executive Officer  
8F Asset Management

Andrew Lee  
Chief Executive Officer  
EFG Asset Management

Tobias Bland

Chief Executive Officer  
Enhanced Investment Products

5.00pm

Closing remarks

Key learnings to implement

Malik S. Sarwar  
CEO  
K2 Leaders

5.10pm

Forum Ends