HUBBIS INVESTMENT FORUM - Singapore 2023

8.30am	Registration

8.55am — Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.00am — Panel Discussion

Private Wealth Managers - Evolving the Proposition

- What's the role of Singapore today in the regional / global wealth management landscape?
- Where are the opportunities for further growth?
- What are regulatory and compliance issues that give you the most problems?
- What are the trends shaping the industry in the next ten years?
- Diversity of custody? Safety of custody? Where and how? What are the trends and expectations from clients?
- Big or small? Mainstream or bespoke? What was the effect of the downfall of Credit Suisse and SVB? Where do clients perceive is a safe haven for their money today?
- How are you improving your processes and platform?
- How do you manage delivering advice vs clients who want to work by themselves?

Chair

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

Speaker

Vincent Magnenat
Limited Partner, Global Head of Strategic Alliances, Asia Regional Head
Lombard Odier

Harmen Overdijk
Chief Investment Officer
Leo Wealth

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

9.30am — Presentation
Re-Inventing Access to Private Markets

Vincent Clause
Global Head of Funds Strategy and Business Development
Euroclear

- Why are private markets an increasingly critical part of private wealth clients' portfolios?
- How do private wealth managers access private markets at the moment and what are the pros and cons?

- What trends are emerging for new operating models to improve access to this asset class?
- What does the future hold for investing in private markets?

9.45am

Panel Discussion

Navigating more Challenging Investment Markets

- What are the opportunities and challenges for the year ahead?
- How are you managing risk? Is it time to take on more risk?
- What's your favourite asset class now?
- What's your view on alternative investments? Private Markets?
- What is the outlook for interest rates in the US and in Europe? And how should clients respond?
- Is there an equity bubble? If so, where? Where can investors find value today?
- In the context of the fixed income and credit markets - should private clients today be investing in higher quality asset classes, or should they go down the credit spectrum? Should they consider taking more risk to get a higher income in the current market environment?
- Do investors need to adjust strategic allocations based on today's macro backdrop? What are the most likely assets and strategies to provide effective portfolio diversification?

Chair

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

Speaker

George Boubouras
Managing Director, Head of Research, Investments & Advisory
K2 Asset Management

Shrikant Bhat
CEO, Investments Linked & Pension Business
AIA

Steve Brice
Chief Investment Officer
Standard Chartered Private Bank

10.15am

Presentation
Empowering Impact Investments with Mikro Kapital: a path to positive change along the Silk Road

Michele Mattioda
Director
Mikro Kapital

- Impact Finance and Microfinance: Explore Mikro Kapital's unique approach to microfinance, enhancing the opportunities for developing markets with a unique procedure to manage the risk and control the full value chain end-to-end, without intermediaries.
- Investing in Local Communities: Discover how Mikro Kapital invest in local Portfolio companies across emerging regions, empowering MSMEs with micro-credits, micro-loans, and sharing economy solutions.
- Diversify and Thrive: Uncover Mikro Kapital's resilient investment opportunities in real

economy sectors, with a remarkable Risk/Reward record and a default rate below 1%. Explore the transformative growth of the global microfinance market.

10.30am

Presentation
Lumen Vietnam – Investment Pearl in Southeast Asia

Cong Minh Luong
Head of Research
Vietnam Holding Asset Management

- China Plus One Strategy: Vietnam
- Macro Insights
- Why Vietnam? Vietnam is an excellent diversification for your portfolio

10.45am

Presentation
Multi-Sector Income – Seeking opportunities off the beaten track

Phil Gronniger
Client Portfolio Manager
Janus Henderson Investors

- While short-term rates might stay "higher for longer" they are however not there "forever".
- Janus Henderson Multi-Sector Income Fund offers relatively attractive levels of yields across the entire fixed income universe, allowing investors to receive income while avoiding being overexposed to short-term yields.
- Securitized assets offer unique opportunities for managers with the necessary expertise – we are finding good opportunities in MBS (agency and non-agency), AAA CLOs, CMBS, and high-quality ABS.

11.00am

Refreshment & Networking

11.30am

Presentation
The Re-Birth of Guaranteed Products - Traditional Concepts with Modern Application

Robert Painter
Head of Product and Actuarial
Axonic Insurance Solutions

The recent evolution and resurgence of the US annuity and guaranteed investment product markets:

- Bonds are back – Markets respond to the Fed.
- Investors respond rationally to market related events via product selection.
- Product design and innovation responds to regulatory changes.

Insurance guaranteed products versus bank structured products: Compare and contrast the current designs and markets:

- Why insurance guaranteed products will continue to move into the realm of bank structured products.

The next generation of products - reshaping the return distribution:

- Moving beyond investors accepting market beta or structured “bets” on market outcomes.
- Providing retail investors customization and access to sophisticated solutions – technology is the key to delivery.

11.45am

Panel Discussion

Enhancing the Engagement with Clients

- What is client engagement all about in the post-pandemic universe, how has it evolved and where is it heading?
- Can the ‘human touch’ be replaced by digital?
- How do you deliver advice while creating scalability?
- How can you improve ‘portfolio solutions’ for clients?
- How can digital help create the right ‘thematic’ engagements with clients?
- CIO tools: How to source best in class products?
- Risk oversight: How do you ensure risk and ESG suitability across advisors and clients?
- Sales enablement: How do you assess current portfolios and proposed new solutions?
- Client engagement: How do you increase client retention with value added insights?
- Where and how can digital help private wealth management firms better engage with their clients?
- How can the advice on offer be curated and delivered to be more relevant, more informative, more tailored and more engaging?

Chair

Dominic Gamble
CEO and Founder
GoUpscale

Speaker

Eddy Loh
CIO, Group Wealth Management
Maybank

Gareth Nicholson
Chief Investment Officer and Head of Discretionary Portfolio Management, International Wealth Management
Nomura

Juan Aronna
Head, Investment Solutions and Products, RBC Wealth Management Asia
RBC Wealth Management

John Ng
Head of Funds
DBS Bank

12.15pm

Presentation
Dynamic Exposures: Unpacking Emerging Markets Opportunities and Risks

Oleg Ruban
Executive Director and Head of APAC Equity Solutions
MSCI

Emerging market diversity presents an eclectic mix of investment possibilities. Investors may seek growth from more favorable demographics, uncorrelated balance with advanced economies, or wider exposure to transformative secular trends through global industry leaders. In this session, we will unpack the bloc's latest development in terms of trade, growth, and financial openness. We will also discuss the wide array of tools that you can integrate into your investment process for targeted, strategic allocation into this uniquely dynamic investment class.

- Evolution of Emerging Markets Opportunities
- Factors Driving China's Evolving Role in Global Portfolios
- Expansion of Indian Equity Opportunity Set
- Integrate Emerging Markets into Investment Process

12.30pm

Presentation
Can China Consumption Continue to Sustain?

Bruce Zhang
Head of Fixed Income
CSOP Asset Management

- Where are we right now in terms of Global Macro?
- What are some of the factors influencing HK/CN Equities?
- Where are we in China's recovery?

12.45pm

Presentation
Why enhancing industry content is a strategic priority and how to do it

Dominic Gamble
CEO and Founder
GoUpscale

- What does content mean and why is it important today?
- The need: the bad state of content in our industry today
- The solution: transformation without the transformation budget
- The role of GenAI technology for content generation going forward

12.55pm

Presentation
Is the stock market predictable?

Frank Maltais
Managing Director, Quantitative Trading & Investments
United River Capital

- The data driven approach and importance of having a trading plan. Why does it matter in this volatile environment?
- Does Technical Analysis still work in 2023? How about the use of machine learning and AI concepts in price projection?
- How does Hedgtrade act as the fund manager's wingman? How do you anticipate

- drawdown for hedging purposes?

1.05pm Lunch & Networking

2.00pm Panel Discussion

Do Independent wealth managers offer a better client experience and advice?

- How is the independent wealth movement progressing?
- How are the specific requirements of clients changing? Why do they use an EAM / MFO?
- What are the business models that are relevant to this segment?
- How does a single-family office or ultra-high net worth client choose the right multi-family office?
- How do you explain your wealth management proposition in comparison to a private bank?
- What must you offer to deliver a genuinely client-first advisory offering?
- How would you explain your value proposition?
- Do you need an investment adviser or CIO to run a meaningful and effective boutique independent wealth management firm?
- Where do you get the best inputs when considering the advice that you give to clients?
- Who do you partner with for success? Platforms / Investments / Tech / Professional Service?
- How do you build a good culture? How do you grow the business?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Ashwin Patravali
Director, Institutional Sales
Kristal.AI

Shilpi Chowdhary
Chief Executive Officer, Managing Director
Lighthouse Canton

Charlie O'Flaherty
Partner
Finaport

2.40pm Workshop

Tech-resilience in the path towards multipolarity

Wendy Chen
Senior Investment Analyst
GAM Investments

- US-China relation: a game of offense and defence
- US in Transition: AI and tech re-shoring amid political turbulences
- China in Transition: when and how would the rebound happen?
- Likely beneficiaries from the US-China rivalry

3.20pm Panel Discussion

Impact Investing and Microfinance Present Exciting Opportunities for Asian Private Clients

- Impact Investment – how would you explain this opportunity? How do you engage this opportunity?
- Financial Returns with Social Impact – what does this mean in reality?
- Impact Investment – trends and developments in Asia and Emerging Europe. Is the market growing?
- How can this provide diversification to portfolios?
- Impact investing is not philanthropy and doesn't have to be discretionary. Can you generate health returns in the environmental space just because of the macro tailwinds from climate change?
- For family offices, is the biggest opportunity the de-risking their core business?
- How can you get investment exposure to high-yield, differentiated 'real economy' opportunities?
- Sustainable Development Goals (SDGs) – is this increasingly important?
- How do European and Asian Family Office, Multi-Family Office and Ultra high net worth investment clients assess and manage their Impact Investment allocations?
- What is the contribution to clients' investment portfolios of micro finance investments, that have zero-correlation to equity-markets?
- Due Diligence and Impact Measurement – what must you consider?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Diana Watson
Investment Manager
Tsao Family Office

Thomas Riber Knudsen
Director, ESG & Impact Investing
Rumah Group

George Boubouras
Managing Director, Head of Research, Investments & Advisory
K2 Asset Management

Sylvie Khau
Managing Partner
Mastery Holdings

4.00pm Refreshment & Networking

4.20pm Panel Discussion

Content Engagement Strategies for Wealth and Asset Managers

- How can we improve the client experience? What does the client expect and how effective are we at providing them with information they need?
- Does any client actually read research and product factsheets? How can we make content more interesting, relevant and engaging?
- What is the key to improving the content produced by wealth and asset managers?
- How can we deliver content and ideas, align them with sales objectives and integrate to the existing technology stack?
- How do we decide what content is meaningful and interesting for our clients? What is working? How can we evolve?

- How can we deal with compliance challenges?
- Can AI technology help?

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5.00pm	Forum Ends