Investment Products and Solutions – Exploring the way forward

3.00pm

Investment Products and Solutions – Exploring the way forward

Approach to client advising:

- How are clients responding to the current global economic situation, what mistakes became apparent in their investment approach leading up to the crisis and what are they likely to do in the next few months?
- How are investment views being communicated internally and externally (to clients)? Are clients bought in to staying invested or more inclined to sit in cash? How does client communication of house views need to be improved to be more impactful/convincing?
- In constructing client portfolios do traditional asset classes need to be re-assessed? Is the 60/40 model in jeopardy?
- Does DPM need to play a greater role in client's portfolios going forward?

Organisational Challenges for the New Normal

- How easy is it to advise clients while working from home? What works well and what doesn’t
- Where is investment required by firms to make things more efficient and client enabled given the new realities?
- How is the traditional private banker relationship approach likely to change and develop?

Managing Market Turbulence/Change

- Is an increase in volatility here to stay?
- Are product providers adapting fast enough to the investment themes of the future? What are these themes and how easy are they to implement?
- Where are we in the bond cycle? What happens if inflation moves higher, how do we adapt fixed income products to a rising interest rate cycle?
- If higher volatility is here to stay should we be re-assessing the hedge fund space?
- What are the challenges and opportunities in the credit and lending space going forward – what is the experience currently and how are wealth managers adapting?

Impact of Macro Issues Going Forward

- What does the increasingly anti-China dialogue from the West mean for Asia?
- Is there a problem in the Euro-Dollar market? How might this impact Asia?
- How are investment models going to adapt to MMT?

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	Arjan de Boer Head of Markets, Investments & Structuring, Asia Indosuez Wealth Management
4.00pm	Webinar Ends