Investment Solutions Forum 2016

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.10am Panel Discussion

What can save revenues in 2016?

- How can you make money this year?
- What investment solutions are best suited to today's environment?
- 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 event 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
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Speaker

Paul Stefansson
Head of Investment Funds and Alternatives
UBS Global Wealth Management

Marc Lansonneur
Managing Director, Head of Managed Solutions and Investment Governance
DBS Private Bank

Arnaud Tellier
APAC CEO, Wealth Management
BNP Paribas Wealth Management

Nicolas Rigois
Managing Director, Head of Wealth Market Product & Sales
Standard Chartered Bank

Franck Fayard
Director, Head of Product Engineering, Asia
Commerzbank

9.55am Presentation
Private equity investing in emerging markets

Scott Collison
Head of Alternatives, Asia
Franklin Templeton

- Private equity investments in emerging markets have been enjoying strong growth in recent years
- Private equity has an ability to access structure, themes and market segments that are important in emerging markets but are not available in public equity
- Private equity in emerging markets has historically provided superior returns to public equity

10.15am Presentation
Portfolio hedging strategies using derivative instruments

Chinmay Patil
Executive Director, Investment Solutions
Leonteq

- Why hedging portfolios is important and diversification is not enough?
- What strategies can we use to cheapen hedging costs?

10.35am Refreshment & Networking

11.05am 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?

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Tuan Huynh
Global Head of Discretionary Portfolio Management
Deutsche Bank Wealth Management

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

Hrishikesh Unni
Managing Director, Client Investments Head of Best Practices Program
Taurus Wealth Advisors

Anthony J. Harper
Head of Business Development Managed Account Partners

Ekkehard J. Wiek
Managing Director
Straits Invest

11.50am Presentation
Multi-asset portfolios powered by ETFs

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

- Managing portfolios in today's changing markets
- Constructing portfolios in a scalable, cost efficient manner
- Portfolio models powered by ETFs

12.10pm 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

12.30pm Lunch & Networking

1.20pm Panel Discussion

Creating more long-term value for portfolios

- How can we make the engagement with investment solutions more 'sticky'?
- What is the role now for funds in portfolio construction?
- How important this year are fixed income investments or alternatives like credit notes – which gives you a steady stream of income?
- How can investors be creative in generating yield – especially in Asian local currency where rates are a little higher?
- How should clients view alternatives within their portfolios?
- What's the role of real estate in today's markets?
- Public vs private markets

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Speaker

Jean Chia
Chief Investment Officer & Head, Portfolio Management & Research Office
Bank of Singapore

Stanley Sia
Chief Financial Officer, Risk & Compliance Group Finace
Standard Chartered Bank

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Simon Ip
Head of Singapore, Markets and Investment Solutions
Indosuez Wealth Management

Christophe Aba
Managing Director, Regional Head of Investments for South-east Asia
J.P. Morgan Trustee

Arthur Wu
Senior Investment Analyst
Morningstar

2.05pm Presentation
SMAs: can HNW investors find them in Asia today?

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

- What is an SMA and how are they used in Australia, the US and Japan?
- How does an SMA fit into discretionary services?
- Who is offering SMAs in Asia and why?
- Fully disclosed versus pooled – key differences
- Rebalancing and automation – fintech requirements
- Where do SMAs using third party models fit on the wealth management shelf? Will they be disrupted by robo-advisers?

2.25pm Presentation
Digital advisory platforms – the future of investment advice?

Patrick Donaldson
Head of Customer Strategy, APAC
LSEG

- What's been happening in the robo market to date?
- Is there any strategic value in using a digital advisory platform rather than a robo?
- What does the future of digital advisory platforms look like?

2.45pm Refreshment & Networking

3.15pm 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

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Speaker

Roger Meier
Managing Director, Senior Advisor, Head Structured Products Advisory Asia
Julius Baer

Ashkay Prasad
Managing Director, Head of Capital Markets, Wealth Management
Deutsche Bank

Rohit Jaisingh
Head, Equity Investment Products
DBS Bank

Conrad Huber
Director, Product Sales Asia Pacific, Private Banking Division
Credit Suisse

Emmanuel Guillaume
Director, Head of Structured Products, Asia
UBP

4.00pm Panel Discussion

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

- Where are we heading in the second half 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 second half 2016?
- Risk management is key – but how can we get it right?

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Speaker

Leonardo Drago
Chief Investment Officer
AlTi Tiedemann Global

Prashant Bhayani
Chief Investment Officer, Asia
BNP Paribas Wealth Management

Juerg Kiener
Managing Director & Chief Investment Officer
Swiss-Asia Capital

Pankaj Nagrath
Managing Director
Bank of Singapore

4.45pm	Forum Ends