Investment Solutions Forum 2017

8.40am	Registration
9.00am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.05am	Panel Discussion

What are we going to do for the rest of year?

- Every private bank has done well in the first few months of 2017 – what now?
- Does advisory actually mean execution?
- Advice vs discretionary – what's best?
- Are the fees we charge clients transparent in Asia?
- Where are we in convincing clients about long-term asset allocation and portfolio construction?
- Do we really care about the client and delivering performance?
- How do we overcome the struggle in Asia to give consistent and structured portfolio-led advice – rather than just execute single trades?
- How do you define what the client wants?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Paul Stefansson
Managing Director, Investment Products & Services, Singapore Head Portfolio Specialists
UBS Wealth Management

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

Arnaud Tellier
Head of Investment Services Asia
BNP Paribas Wealth Management

Hou Wey Fook
Head of Managed Investments
Bank of Singapore

Speaker

9.55am Presentation
Fixed income markets on demand

Stephen Cohen
Managing Director, Global Head of Fixed Income Beta

BlackRock

- Today, technological advances are rapidly transforming finance. Old operating models are being rethought and modernised. We see this disruption occurring within the fixed income industry and it could not come soon enough
- After all, investors can no longer rely exclusively on the old bond trading model to meet all their liquidity needs
- We take a look at how ETFs have revolutionised the fixed income industry, and how bond ETFs on an exchange provides investors with the fixed income markets, on demand

10.10am

Presentation
How to think big in Asia ex-Japan small cap equities

Siddhartha Singh
Head of Client Portfolio Management, Asia Equities
PineBridge Investments

- An on-the-ground research presence in Asia and a thorough knowledge of companies are among the key success factors in realising one of the largest alpha opportunities in global equity markets, particularly among many hundreds of investable, high-quality, under-researched small and mid-cap stocks in Asia
- This introductory session serves as a teaser for those who are interested in the Asia small and mid-cap stocks universe and want to learn more on the topic in the 40-minute workshop

10.25am

Presentation
A case for hybrid securities in your clients' portfolio

Matthew Byer
Executive Director & Chief Operating Officer
Spectrum Asset Management

- A high-quality, predominantly investment-grade portfolio with an attractive yield

10.40am

Refreshment & Networking

11.10am

Presentation
The significance of Shariah investing

Sharizad Juma'at
Chief Executive Officer, RHB Islamic International Asset Management, and Group Head of Islamic Business
RHB Islamic Asset Management

- Understanding Shariah investing concepts
- How resilient is Shariah strategy vis-à-vis unconstrained strategy?
- Are there similarities between socially responsible investing and Shariah investing?

11.25am

Presentation

Digital delivery of wealth management - the era of the platform?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

- Transition of wealth management into the digital era
- Distribution / connectivity is key

11.40am

Presentation
Valuation of counterparty risk

Vladimir Pavlov
Vice President, Financial Engineering
Numerix

- The current framework for valuing counterparty risk
- Technology challenges with counterparty risk valuations

11.50am

WealthTalk

Investing myths: avoiding flawed thinking in investment recommendations

- A short discussion on de-buking widely-accepted investment truisms to improve portfolio performance

Leonardo Drago
Chief Investment Officer
AlTi Tiedemann Global

12.00pm

WealthTalk

Do we really need views on markets?

- Agnostic portfolio construction reveals more robust than (often over-crowded and consensual) market views
- This is timely to consider in a year which has so far seen initial widespread expectations of fiscal bazooka, self-sustaining reflation dynamics, a strong dollar and steepening yield curves deflating at the speed of the light

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

12.10pm

Panel Discussion

Do we need a new twist on discretionary portfolios?

- Are we making any progress in creating a 'stickier' engagement with clients?
- How can banks really make discretionary offerings work, to increase their share of client assets in DPM?
- Is there still any real potential for DPM to grow in Asia?
- Is this even relevant for Asian clients?
- Do we need to change the content of mandates and portfolios?
- How are you working with third-party partners? White-labelling is best?

- What's the role of digital?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Jean-Louis Nakamura
Chief Investment Officer - Asia
Lombard Odier

Tuan Huynh
Chief Investment Officer and Head of DPM, Asia Pacific
Deutsche Bank

Aman Dhingra
Head of Advisory, Singapore
UBP

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

Hrishikesh Unni
Executive Director
Taurus Family Office

Speaker

12.55pm	Lunch & Networking
1.45pm	Panel Discussion

Challenging the traditional investment approach

- Is there any real disruption to investment processes? What's worked, and what hasn't?
- Can we consolidate and automate the investment process? What's the best way to do this?
- How do we provide any real Intellectual insights?
- How do you view robo advisory? AI? How on earth will you regulate and audit this?
- Can a digital approach be innovative for the investment engine – and not just be about distribution?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Will Lawton
Co-Founder
Eigencat

Charlie O'Flaherty
Partner
Crossbridge Capital

Michele Ferrario
Co-Founder and Chief Executive Officer
StashAway

Vineet K Vohra
Director & Practice Leader
Arete Financial Partners

Mark Nelligan
Chief Executive Officer
Pershing Singapore

Duncan Klein
Head of Product Management
BondIT

Speaker

2.30pm Presentation
Portfolio construction approaches in the advisory process

Sumit Sethi
Executive Director, Analytics Regional Manager - APAC
MSCI

- Should our perspective to manage clients' wealth be more outcome-oriented?
- What's the appropriate wealth management capital allocation framework?
- Emerging approaches to build more robust asset allocation

2.40pm WealthTalk

Incorporating ESG into the investment process

- Difficulties in selling the ESG idea to clients
- One definition of ESG, several implementation possibilities
- Challenges in ESG investing and the normal investment process

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

2.50pm WealthTalk

Observations on the Asian robo market

- The opportunity: corporate vs start-up
- Market moves and traction so far
- Self-service vs hybrid in Asia

Aki Ranin
Chief Operating Officer
Bambu

3.00pm Refreshment & Networking

3.25pm Panel Discussion

Delivering performance

- How are you delivering performance?
- Which assets do clients want? What’s the best way to source and deliver on this?
- Any role for passive and index products?
- After the mega structured products bonanza in Q1 – what next?
- What’s the role for private debt and alternatives within portfolios?
- How can investors be creative in generating yield?
- How do clients now view their risk?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Akshay Prasad
Managing Director, Head, Structured Products Asia, Global Products and Solutions
Deutsche Bank Wealth Management

Roger Meier
Executive Director, Head of Structured Products Advisory, Asia
Bank Julius Baer

Emmanuel Guillaume
Director, Structured Products
UBP

Rohit Jaisingh
Head, Equity and Commodity Investment Products
DBS Bank

Mathieu Perfetti
Director, Head of Private Equity Asia
Indosuez Wealth Management

Speaker

4.10pm Panel Discussion

How will you navigate the investment markets in 2H 2017?

- Will the markets retract in the second half of the year?
- How will the macro environment, interest rates, inflation and fund flows impact performance?
- What will be the impact of US markets?
- How will geo-political risks impact the landscape?
- What can you do to protect the portfolios from, and take advantage of, the large-scale structural shifts in the horizon?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Ranjiv Raman
Head of Investments & Treasury - Singapore

Cazenove Capital

Aditya Monappa
Head of Asset Allocation & Portfolio Solutions, Group Wealth Management
Standard Chartered Bank

Bryan Goh
Chief Investment Officer
Bordier & Cie

Pankaj Nagrath
Executive Director
Bank of Singapore

Michael Chang
Chief Investment Officer, Fixed Income
RHB Asset Management

Speaker

5.00pm	Forum Ends