Hubbis Investment Solutions Forum 2019

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel discussion

Big Opportunities / Big Challenges

- What's your USP?
- What have you got that means you will be here in five years?
- How must you refine and redefine your value proposition today?
- Are you nimble, responsive and adaptive?
- What's the advantage and disadvantage to pure-play firms vs universal banks?
- What is the client expecting from you today?
- What trends are we seeing in Europe and North America in wealth and asset management?
- Where is growth coming from over the next five years? Bigger share of wallet? Lending? Next-gen leads? Organic vs acquisition vs partnership?
- Biggest opportunities for the next three years?
- Biggest challenges for the next three years?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Vincent Magnenat
Chief Executive Officer of Asia Pacific
Lombard Odier

Arnaud Tellier
Co-CEO, Asia Pacific, Head of South-East Asia
BNP Paribas Wealth Management

Simon Lints
Chief Executive Officer, Singapore
Schroders Wealth Management

Rohit Bhuta
Chief Executive Officer
Crossinvest

Richard Nino
Executive Vice-President, Head of Global Distribution
Fiera Capital

9.55am Head - to - Head Q & A

How is technology Impacting the delivery of Wealth Management?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

- Transitioning wealth management into the digital era
- Distribution and connectivity is key

10.05am	Presentation State of EM: unearthing hidden gems in China and ASEAN

David Lai
Partner & Co-Chief Investment Officer
Premia Partners

- Who are we and why do we focus on simplifying beta choices in Asia
- A review of opportunities in China new economy and ASEAN stocks, as well as implementation options
- Introducing a better way to access Asian frontier and global EM markets

10.15am	Panel discussion

Tweaking the investment engine

- The revenue squeeze is on. Where does your revenue come from in the future?
- How do you reconcile the suitability of investment products you sell to your clients with profitability?
- When you launch a new product – how do you gauge whether it was successful?
- 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?
- Investing is a simple process that is not easy to execute. The investor can be irrational. It is behavioural. Is Behavioural Finance a critical component to manage client expectations?
- How are we improving the investment platform and processes?
- Can we cut cost – without impacting the client experience or performance?
- What's the role of digital today?
- Can digital add greater value to traditional advisory?
- What's the right balance between face-to-face and technology driven interaction?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

Rodolphe Larque
Head of Managed Solutions APAC
Credit Suisse Private Banking

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

Tuck Meng Yee
Partner
JRT Partners

Hrishikesh Unni
Managing Director, Client Investments
Taurus Wealth Advisors

Jalil Rasheed
Investment Director
Invesco

Pierre DeGagne
Executive Director – Investment Funds Fund Selection & Strategy
DBS Private Banking

11.10am Refreshment & Networking

11.35am Presentation
The case for frontier markets and the continued growth of MENA

Dominic Bokor-Ingram
Emerging Markets CIO / Portfolio Manager
Fiera Capital

- Frontier provides high growth and low correlation to global equity markets
- In a global context - the macro stands out
- Reform in the MENA region

11.45am Presentation
Beware of Greenwashing as ESG Momentum Builds

Shihan Abeyguna
Head of Business Development, Asia
Morningstar

- Growth of ESG Funds
- What is Greenwashing?
- What to do about Greenwashing?

11.55am Presentation
Unlocking the potential of Private Markets

Sam Clothier
Investment Director, Private Market Specialist Distribution
Aberdeen Standard Investments

- Potential to deliver higher returns than traditional assets
- Add a new source of risk premia to investment portfolios
- Lower correlation of returns to public markets

12.05pm

Presentation
Picking winners in Asia

Odile Lange-Broussy
Senior Portfolio Manager
Lombard Odier

- Is Asian equities a compelling investment case?
- The case for sustainable investment in Asia
- How do we generate alpha?

12.15pm

Panel discussion

"Young investors" - Investing with Purpose?

We use the word "Millennial" regularly. Most “young” people consider the word an insult, denoting someone who is lazy, spoiled, feckless, etc. Regardless of what their attitude is and how effective they may be - many are coming into serious wealth, thanks to rich and doting parents. Winning the hearts and minds of "Young investors" – will be key to your long-term success. But are you too old to deal with them – and has your bank got any ideas around finding tangible, innovative ideas to get them engaged? Intergenerational wealth preservation is not easy – it requires holistic planning, targeted education and an acute focus on the customer experience.

- How do you deal with the younger generation?
- What is their attitude towards investing?
- What do the younger generations expect from you?
- What are banks doing to create a holistic and meaningful user experience for them?
- Beyond investments, what other engagement do you need to provide?
- Has client demand for Impact investing, SRI, ESG increased?
- Do you provide these solutions in-house?
- Is impact investing an add-on or a core investment?
- Which areas would you invest in or avoid?
- What's the next phase of impact investing?
- Assessing products: the good, the bad and the ugly
- Does ESG deliver superior returns?
- Can these offerings be bespoke to deepen relationships with clients?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Arjan de Boer
Deputy Chief Executive, Head of MIS, Asia Markets, Investments & Structuring, Asia
Indosuez Wealth Management

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

Alvin Lee
Managing Director, Head of ASEAN Account Management
IHS Markit

Paul Stefansson

Managing Director, Global Co-Head of Investment Funds
UBS Wealth Management

Dr. Silvio Struebi
Partner
Simon-Kucher & Partners

13.00pm Lunch

13.50pm Workshop

How is technology impacting the delivery of Wealth Management?

Damian Hitchen
Chief Executive Officer, Singapore
Swissquote

- What are the main evolutions being driven by technology?
- What are the client demands re; technology? What are the expectations?
- Is the industry, and its main players, adopting and adapting its delivery of services?

14.15pm Workshop

State of EM: unearthing hidden gems in China and ASEAN

David Lai
Partner & Co-Chief Investment Officer
Premia Partners

2018 witnessed an aggressive EM correction on the back of USD strength, global growth and trade war concerns. While broader EM still faces some of these concerns, portions of EM markets in our backyards have strong fundamentals, low valuations, are under-invested and are now benefiting from global supply chain rebalancing and improved currency dynamics. Emerging ASEAN stocks are benefiting from USD weakness and supply chain repositioning. China new economy stocks are benefiting from an increasingly domestic and consumption driven market. Markets like Vietnam, a frontier market yet to be upgraded to EM, looks particularly interesting as many now view it as the main beneficiary of the dispute between China and the US.

14.40pm Workshop

Frontier markets and alpha generation

Dominic Bokor-Ingram
Emerging Markets CIO / Portfolio Manager
Fiera Capital

- Why we can generate high alpha
- How we generate high alpha
- Why returns are sustainable over the cycle

15.05pm Refreshment & Networking

15.30pm Panel discussion

Shifting the Dial – how do investors (Family Offices, UNNW, Private Clients) recalibrate their portfolio for the year ahead?

- 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?
- Risks and opportunities for 2H 2018? How are you delivering performance? Managing risk?
- What Asian Markets offer the best value? What's your view on China?
- What is your current thinking about the role of fixed income and credit in HNW / UHNW clients' portfolios?
- What are the prospects for US dollar interest rates in the coming 12 months?
- Equity – where is best? Where is worst?
- What must be considered when investing in emerging markets?
- What's the role of structured products in 2H 2019?
- Any role for passive and index products?
- What's the role for private debt and alternatives within portfolios?

Chair

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Speaker

Johan Jooste
Head: Rates
Bank of Singapore

Martin Goerojo
Director, Capital Markets Investment Products - Wealth Management, Asia Pacific
Citi

Laurent Lequeu
Head of Portfolio Management
Lumen Capital Investors

Anand Ramachandran
Partner & Fund Manager
River Valley Asset Management

Olivier Monnard
Investment Advisor
Standard Chartered Bank

George Boubouras
Managing Director & Chief Investment Officer
Caledonia Pacific Capital Partners

16.15pm Panel discussion

Interesting and relevant Investment Solutions for YOUR clients

- Is GOLD an interesting asset class today? What's its role in a client portfolio?
- What's the difference between physical and paper gold?
- What are the interesting opportunities in Emerging and Frontier Markets?
- What are the opportunities to invest in Vietnam today?
- It's one year since Vietnam failed to enter MSCI's watchlist for a market status upgrade – will it happen this year?
- Can investors look to make money via a multi asset strategy as volatility / market uncertainty increases?

- Are there any thematic / more secular equity ideas that are poised to do well? Like the environment and climate change?

Chair

Michael Stanhope
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Speaker

Mehak Dua
Business Development
GMO

Zvika Rotbart
Business Development Executive
J. Rotbart & Co.

Steven Mantle
Head of Marketing & Investor Relations
PXP Vietnam Asset Management

Benn Ng
Managing Director, Head of Southeast Asia
Raffles Family Office

Dominic Bokor-Ingram
Emerging Markets CIO / Portfolio Manager
Fiera Capital

17.00pm	Forum End