Investment Solutions 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?

- How do wealth managers engage clients on solutions after such a run in the markets?
- Everything is going well - but how to prepare client portfolios for the next big market correction?
- How cyclical is the transactional business?
- Does advisory actually mean execution?
- Advice vs discretionary – what's best?
- Are the fees we charge clients transparent in Asia? What is the 'correct' fee rate for advice?
- 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 "active" should the management of portfolios be? Frequency of turnover, selection of funds/holdings, etc?
- How can private banks and wealth managers play a bigger role in long-term retirement planning?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Emmanuel Triomphe
Head of Investment Platforms and Solutions (IPS), Capital Markets Distribution, APAC
UBS Wealth Management

Michael Levin
Head of Asset Management, Asia Pacific
Credit Suisse Asset Management

Harmen Overdijk
Founding Partner
Capital Company

Kevin Liem
Chief Investment Officer
CBH Asia

Aleksey Mironenko
Partner & Chief Distribution Officer
Premia Partners

Speaker

9.55am

Presentation
Fixed income markets on demand

Christian Obrist
Head of iShares Distribution Asia
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

10.15am

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

10.30am

Presentation
Smart beta in China – more than meets the eye

Aleksey Mironenko
Partner & Chief Distribution Officer
Premia Partners

- Is investor bias and behaviour in A-shares different from what we observe elsewhere?
- Can smart beta strategies benefit from these behaviours to generate excess return?
- Is traditional stock-picking the only way to invest in China? (hint: the answer is no)

10.45am

Presentation
Looking for high quality income strategies?

Suresh Singh
Managing Director, Head of Funds Distribution - Asia
Principal Global Investors

- Principal's active, multi-boutique approach

- Built on our heritage of retirement and income solutions

11.00am	Refreshment & Networking

11.30am WealthTalk

Evidence-based investing

- What is this and when will it come to Asia?
- Putting the spotlight on active management

Harmen Overdijk
Chief Investment Officer
Leo Wealth

11.45am Presentation
Cryptocurrencies - are my clients invested?

Ville Oehman
Co-Founder
Helvetic Investments

- Cryptocurrencies are up USD150 billion in one year. Can this asset class still be ignored as part of a balanced portfolio?
- Will the un-banked get banked, or crypto'ed?
- Cryptocurrency regulation is emerging. What's the right timing to get involved?
- Custody, infrastructure and security challenges for asset managers

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

12.15pm 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? What do the clients want?
- 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? Can 'robo' work in private banking?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Jean-Louis Nakamura
Chief Investment Officer - Asia
Lombard Odier

Lemuel Lee
Deputy Head of Investments Services, Asia Pacific
BNP Paribas Wealth Management

Stewart Aldcroft
Chairman, Cititrust Limited Senior Advisor & Managing Director, Citi Markets & Securities Services
Citi

David Lai
Co-Chief Investment Officer
Premia Partners

Speaker

1.05pm Lunch & Networking

1.55pm 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?
- Advice vs robo – together or separate?
- 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

Alex Ypsilanti
Chief Executive Officer and Co-Founder
Quantifeed

Steven Seow
Head of Wealth Management, Asia
Mercer

Speaker

2.45pm Presentation

The technology wake-up call for the customer-based business

Linus Yu
Business Analyst
Numerix

- Impact on the wealth management business as a result of technology transformation
- Top 3 priorities for optimal performance in a customer-based business

3.00pm WealthTalk

Innovation in the wealth management industry and implications for wealth managers

- The hype and latest development of robo-advisers in the industry – the investment implications
- Latest innovations in Asia and further afield in Europe and the US
- What do those considering adding a robo-advisory capability need to consider? What would best-in-class robo advisers look like?

Steven Seow
Head of Wealth Management, Asia
Mercer

3.15pm Refreshment & Networking

3.45pm WealthTalk

Why risk-focused investing is a better way to build a portfolio

- Blind-spots in giving portfolio advice – why do most advisers only focus on returns?
- You can't control performance, but you can control risk
- How a focus on dynamically managing risk can greatly improve returns

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

4.00pm WealthTalk

Using HNW insurance solutions for liquidity planning and guaranteed returns

Using HNW Insurance solutions - such as high and low life cover Universal Life, HNW clients can:

- Achieve higher returns, with a guaranteed strong minimum returns, better than a bank account rate
- Secure leveraging and liquidity whenever they need within an insurance policy
- Use insurance solutions for retirement and annuity planning, and effectively avoid probate through proper estate planning

David Varley
Chief Partnership Officer - Brokerage, International HuBS
Sun Life

4.10pm Panel Discussion

How will you deliver performance and navigate the markets for the rest of 2017?

- How are you delivering performance?
- Which assets do clients want? What's the best way to source and deliver on this?
- What's the role for private debt and alternatives within portfolios?
- How can investors be creative in generating yield?
- How will you navigate the investment markets for the rest of 2017?
- How will the macro environment, interest rates, inflation and fund flows impact performance?
- How do clients now view their risk?
- 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 on the horizon?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Mark McFarland
Managing Director & Chief Economist, Asia
Union Bancaire Privée

Tong Yew Sng
Joint Chief Investment Officer
Nomura

Edmund Yun
Head of Investment Solutions
CIC Investor Services

Nitin Dialdas
Chief Investment Officer
Mandarin Capital

Belle Liang
Head of Investment Advisory, Investment Services Division
Hang Seng Bank

Speaker

5.00pm Forum Ends