

Investment Solutions Forum 2018

8.40am Registration

9.00am Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am Panel Discussion

Reengineering the platform

- What does it mean today to 'add value' to a client?
- What do you need from your investment platform? How is that changing?
- How will you grow your platform in the next few years?
- Can a digital approach be innovative for the investment engine?
- Should we be using AI / data / robo? Can it enhance the ability to make better investment decisions?
- To what extent do you see new firms – possibly digital - disrupting your business?
- What are your biggest challenges and opportunities?
- Impact of key business trends like passive investments, fees, transparency, regulations?
- You had a great year in 2017. What's your revenue replacement strategy for the next two years? Is there a likelihood you will see outflows 2H this year?
- How important is credit risk today?
- Where will net new assets (NNA) come from?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Lavanya Chari
Managing Director, Head of Global Products and Solutions, Asia Pacific
Deutsche Bank Wealth Management

Chun Him Tam
Head of Fixed Income and Currencies, Asia
RBC

Rohit Jaisingh
Head, Equity Investment Products
DBS Bank

Justin Kendrick
Co-Founder, Head of Investment Solutions
Ingenia Consultants

9.55am Presentation
ESG: Our path to a reliable portfolio

Basim El-Shoura

Investment Solutions Specialist UK, Benelux & Asia
Allfunds Bank

- Overview of ESG
- Factors that change an ESG score
- How ESG has been used to generate alpha in a portfolio

10.05am

Presentation
Fixed Income (R)evolution – You Beta Believe It

Ecaterina Bigos
Vice President, Product Strategist for Fixed Income, iShares
BlackRock

The growth of indexing fixed income has been supported by 3 key trends

- Heightened awareness of cost
- Greater push for transparency driven by regulation
- Changes in market structure and liquidity of the underlying bond markets.

Indexing has the power to transform fragmented the bond market into standardized, predictable and efficient exposures that can greatly simplify portfolio construction. Hear more about how the industry has moved towards rethinking Bond ETFs as building blocks in their portfolios.

10.15am

Panel Discussion

Discretionary Portfolio Management and Advice

- Advice vs discretionary – what's best?
- How are you working with third-party partners?
- How can you differentiate your DPM offering? To what extent can you be innovative?
- Given more challenging market conditions – is advice more important than ever?
- Do Asian clients still have a strong desire to retain control? How do you deal with that?
- Opportunities of key market mega-trends of millennial, baby boomers, women empowerment, ESG, SRI. How are you capitalising on these?
- When a client gives you an active advisory mandate – what are their expectations?
- Do Asian clients have unrealistic expectations for higher risk-adjusted returns? Or less so today?
- How do we provide any real Intellectual insights?

Chair

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Speaker

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

Bryan Goh
Executive Director, Chief Investment Officer
Bordier & Cie

Christian Abuide
Head of Discretionary Portfolio Management
Standard Chartered Bank

Gary Tiernan
Head of Investments
Crossinvest

David Gaud
Managing Director, Chief Investment Officer - Asia
Pictet

11.10am Refreshment & Networking

11.35am Presentation
Matthews Asia

Jeremy Sutch
Senior Research Analyst
Matthews Asia

Over the past decade, investment flows have increasingly shifted from active funds into passive instruments. However, investors shouldn't disregard an active approach just yet. After all, it can uncover substantial market inefficiencies and thus provide significant benefits to the investor. But how does it work in practice? And in Asia what characterizes a truly active approach?

11.45am Presentation
ETF Lightning Round: 20 questions in 10 minutes, everything you need to know about ETFs

Rebecca Sin
Head of ETF Sales Trading, Asia Pacific
Commerzbank

- Should I use ETFs
- Am I selecting the right ETF
- How to get the best prices on ETF
- What are popular ETFs that investors are using
- Are there advantages of trading US vs Europe vs Asian based ETFs
- What are the risk with trading ETFs during Asian hours
- How to evaluate liquidity
- Myths on trading EM and Fixed Income ETFs
- Why and what are UCITS ETFs

11.55am Presentation
Emerging Trends in Portfolio Advisory

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

- Systematic approach to discussing market scenarios
- Handling of structured products

- Address questions on impact and sustainability of product ideas

12.10pm

Panel Discussion

Engaging the client. Selecting the best products. Getting better outcomes.

- How are clients engaging managed investments in 2018? Trends and developments?
- How do we select the best funds and products?
- How can we optimize the clients existing portfolios?
- What are the benefits of a managed account platform?
- Is it possible to deliver digital advice? Whats the role of technology?
- Is there a role for robo / AI – to improve the process and get a better outcome?
- Whats are the clients expectations today?
- How do we personalise the approach to each client?
- Does a multi-manager approach using the best-of-breed managers help deliver consistent performance over time, particularly during volatile periods?
- Do manager allocations within a portfolio need to be actively managed to adapt to changing market conditions?

Chair

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Founder & Chief Executive Officer
Hubbis

Speaker

John Lau
Portfolio Manager
SEI Investments

Justin Bramley
Director, Managed Investments- Asia Pacific
Citi

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

Robin Chay
Senior Vice President, Discretionary Portfolio Management
DBS Bank

Julien Le Noble
Senior Director
InvestCloud

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

1.00pm

Lunch & Networking

1.50pm

Room B – Workshop

Fund Research: The building blocks to an investment proposition

- An introduction to the Fund Research capabilities of the Allfunds Bank Investment Solutions team.

- Understand how the team selects the most suitable funds for its global client base.
- Why more and more wealth managers are opting to outsource their fund research requirements to support their investment propositions.

Basim El-Shoura
Investment Solutions Specialist UK, Benelux & Asia
Allfunds Bank

1.50pm

Room A – Workshop

Breaking down the Bond ETF value proposition

Bond ETFs have grown at an astonishing pace and arguably the potential to have an even more transformative impact on financial markets than equity ETFs. What are some of the drivers of growth and how are investors capitalizing on these opportunities? Join us to learn more, including the Fixed Income ETF design and how investors use it in their portfolios.

Ecaterina Bigos
Vice President, Product Strategist for Fixed Income, iShares
BlackRock

2.30pm

Room B – Workshop

Managed Accounts in Asia

Managed accounts are one of the largest and fastest growing segments of the wealth management market globally, eclipsing \$5 trillion of assets in the U.S. market alone. Increasingly they are available in Asia as an important tool for wealth managers to access third party asset managers to implement tailored and transparent solutions for their discretionary portfolio management clients.

- What is a managed account?
- How does it work?
- Making money for clients with managed accounts
- Why is a managed account relevant in Asia today?
- Who is Axial Partners?

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

2.30pm

Room A – Workshop

The Value Of A Truly Active Approach in Asia

Over the past decade, investment flows have increasingly shifted from active funds into passive instruments. However, investors shouldn't disregard an active approach just yet. After all, it can uncover substantial market inefficiencies and thus provide significant benefits to the investor.

But how does it work in practice? And in Asia what characterizes a truly active approach?

During the session, Matthews Asia Senior Research Analyst Jeremy Sutch will outline what it takes to be active in Asia and share tales from the road

Jeremy Sutch
Senior Research Analyst
Matthews Asia

3.10pm

Refreshment & Networking

3.30pm

Panel Discussion

Capital Markets & Structured Products – what can we expect in 2H 2018?

- After the mega structured products bonanza in 2017 – what can we expect in 2H 2018?
- Given where we are – what are some of the best ideas to discuss with clients?
- What strategies will enable Asian investors get higher returns, whilst been mindful of potential market challenges?
- Which assets do clients want? What's the best way to source and deliver on this?
- How can you optimise a client's existing portfolio – is this a priority?
- Any role for passive and index products?
- How can investors be creative in generating yield?
- How should clients now view their risk?
- What are the key drivers of excess return – sources of alpha – in each asset class? How can they help add to overall performance?
- How can HNW clients take advantage of rising volatility?

Chair

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Speaker

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

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

Chinmay Patil
Executive Director, Investment Solutions
Leonteq

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

Olivier Robine
Managing Director, Head of Equity and Commodity-Asia
Commerzbank

Kong Hong Lee
Executive Director, Investment Advisory
DBS Private Bank

4.15pm

Panel Discussion

Investment ideas to discuss with clients today

- 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?
- What's your view on China?
- What Asian Markets offer the best value?
- What's your outlook for interest rates and FX?
- 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?

Chair

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Speaker

Leon Mirochnik
Head of Business Development
Enhanced Investment Products

Rainer Michael Preiss
Executive Director, Investment Advisory
Taurus Family Office

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Tuck Meng Yee
Partner and Founder
JRT Partners

Ranjiv Raman
Head of Private Assets and Equities, Asia
Schroders Wealth Management

Xavier Burkhardt
Executive Director
Leonteq

5.00pm

Forum Ends