HUBBIS INVESTMENT FORUM - Hong Kong 2024

8.30am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion Trends and Priorities - Private Wealth Management in Hong Kong • What's the role of Hong Kong today in the regional / global wealth management landscape? • Where are the opportunities for further growth – for example, accessing the Greater Bay Area? • What are regulatory and compliance issues that give you the most problems? • What are the trends shaping the industry in the next ten years? • Diversity of custody? Safety of custody? Where and how? What are the trends and expectations from clients? • Big or small? Mainstream or bespoke? What was the effect of the downfall of Credit Suisse and SVB? Where do clients perceive is a safe haven for their money today? • How are you improving your processes and platform? • How do you manage delivering advice vs clients who want to work by themselves? Chair Andrew Hendry CEO Asia Janus Henderson Investors Speaker David Friedland Managing Director, Asia Pacific Interactive Brokers Kenny Ho Managing Partner & Founder Carret Private Capital Dr. Nick Xiao Chief Executive Officer Hywin International Lemuel Lee Managing Director, Head of Wealth Management Hong Kong BNP Paribas Wealth Management
9.30am	Presentation How digitisation will transform capital raising and investing in the next 3-5 years Oi Yee Choo CEO

ADDX

- Why tokenisation is a solution to securities digitisation
- The role ADDX plays in the digital asset ecosystem
- What's in it for wealth managers?

9.45am

Panel Discussion

Navigating more challenging investment markets

- What are the opportunities and challenges for the year ahead?
- How are you managing risk? Is it time to take on more risk?
- What's your favourite asset class now?
- What's your view on alternative investments? Private Markets?
- What is the outlook for interest rates in the US and in Europe? And how should clients respond?
- Is there an equity bubble? If so, where? Where can investors find value today?
- In the context of the fixed income and credit markets - should private clients today be investing in higher quality asset classes, or should they go down the credit spectrum? Should they consider taking more risk to get a higher income in the current market environment?
- Do investors need to adjust strategic allocations based on today's macro backdrop? What are the most likely assets and strategies to provide effective portfolio diversification?

Chair

Rossen Djounov
Global Head of Distribution and Client Solutions
GAM Investments

Speaker

Hanzhi Ding
CEO & CIO
BIL Wealth Management

Jaye Chiu
Head of Investment Products & Advisory
Bank of East Asia

Martin W. Hennecke
Head of Asia Investment Advisory
St. James's Place

Isaac Poole
Global Chief Investment Officer Portfolio Manager
Oreana Financial Services

Timothy Tsang
Head of Investment Solutions and Deputy Head of Markets, Investments & Structuring, Hong Kong Branch
Indosuez Wealth Management

10.15am

Presentation
Re-inventing access to private markets

Winston Jin
Head of Business Development

Euroclear

- Why are private markets an increasingly critical part of private wealth clients' portfolios?
- How do private wealth managers access private markets at the moment and what are the pros and cons?
- What trends are emerging for new operating models to improve access to this asset class?
- What does the future hold for investing in private markets?

10.30am

Presentation
Lumen Vietnam – Investment Pearl in Southeast Asia

Cong Minh Luong
Head of Research
Vietnam Holding Asset Management

- China Plus One Strategy: Vietnam
- Macro Insights
- Why Vietnam? Vietnam is an excellent diversification for your portfolio

10.45am

Presentation
China Recovery to Continue

Yi Wang
Managing Director and Head of Quantitative Investment
CSOP Asset Management

- Where Are We in Economic Recovery?
- Monetary Policy to Remain Accommodative
- Expansionary Fiscal Policy to be Expected
- Property Improved But Still a Drag

11.00am

Refreshment & Networking

11.30am

Presentation
AI – the next major technology compute wave

Richard Clode, CFA
Portfolio Manager
Janus Henderson Investors

- A technology with the potential to disrupt multiple industries
- Early stages creates significant long term investment opportunities
- Market hype must be navigated along the way

11.45am

Panel Discussion

Enhancing the Engagement with Clients

- What is client engagement all about in the post-pandemic universe, how has it evolved and where is it heading?
- Can the 'human touch' be replaced by digital?
- How do you deliver advice while creating scalability?
- How can you improve 'portfolio solutions' for clients?
- How can digital help create the right 'thematic' engagements with clients?
- CIO tools: How to source best in class products?
- Risk oversight: How do you ensure risk and ESG suitability across advisors and clients?
- Sales enablement: How do you assess current portfolios and proposed new solutions?
- Client engagement: How do you increase client retention with value added insights?
- Where and how can digital help private wealth management firms better engage with their clients?
- How can the advice on offer be curated and delivered to be more relevant, more informative, more tailored and more engaging?

Chair

Gary Dugan
Chief Executive Officer
DALMA CAPITAL - Global CEO Office

Speaker

Adam Cowperthwaite
Head of Markets, Citi Global Wealth APAC
Citi Private Bank

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

Stephanie Leung
Chief Investment Officer
StashAway

Anthony Chan
Chief Executive Officer
Isola Capital

12.30pm

Presentation
Capitalize on long-term megatrends: A rotation approach

Kevin Zhang
Vice President, Derivatives Licensing and Thematic Indexes
MSCI

- Challenges and opportunities in thematic investing
- A sentiment approach to capture relevant trends
- Customization – local variations

12.45pm

Presentation
Helping EAMs navigate an increasingly uncertain landscape

Emmanuel Guillaume
Head of EAM Asia Pacific
Lombard Odier

- What are the challenges and opportunities in today's environment?

- Systems and solutions – how can we be future-ready?
- Partnering for success

1.00pm Lunch & Networking

2.00pm Workshop

Introduction to Interactive Brokers digital Custody and Execution Platform for EAMs, MFOs

Elizaveta Gridneva
Institutional Sales Manager
Interactive Brokers

Perry Tse
Institutional Sales Manager, Hong Kong
Interactive Brokers

- Introduction to IBKR's Institutional Platform
- Partnering for success: How IBKR helps managers scale their practice and maximize value for clients
- Augmenting your investment experience - a case study

2.40pm Workshop

Discover the Hidden Potential: Unveiling the Benefits of Investing in Subordinated Debt of European Financials

Gregoire Mivelaz
Fund Manager and member of Atlanticomnium's Management Committee
GAM Investments

- Navigating AT1 CoCos: Understanding Risks and Opportunities in the European Financial Landscape
- Capital Structure Secrets: Unearthing the Best Value Opportunities for Savvy Investors
- European Financials: A Positive Earnings Story in the Face of Rising Rates and Increased Profitability
- Seizing the Opportunity: Valuations and Extension Risk - A Winning Combination for Investors in European Financials

3.20pm Panel Discussion

Do Independent wealth managers offer a better client experience and advice?

- How is the independent wealth movement progressing in Hong Kong?
- How are the specific requirements of clients changing? Why do they use an EAM / MFO?
- What are the business models that are relevant to this segment?
- How does a single-family office or ultra-high net worth client choose the right multi-family office?
- How do you explain your wealth management proposition in comparison to a private bank?
- What must you offer to deliver a genuinely client-first advisory offering?
- How would you explain your value proposition?
- Do you need an investment adviser or CIO to run a meaningful and effective boutique independent wealth management firm?
- Where do you get the best inputs when considering the advice that you give to clients?

- Who do you partner with for success? Platforms / Investments / Tech / Professional Service?
- How do you build a good culture? How do you grow the business?

Chair

Ivan Chang
Regional Manager, Institutional Business
Saxo

Speaker

Colin Chau
Chief Investment Officer
Plutus Asset Management

Stephen Pau
Chief Investment Officer
HeFeng Family Office

Keith Wong
Chief Executive
Winland Wealth Management

Jon Dingley
Head of Wealth Management
CBH Asia

Jason Gibbons
Investment Director, Asia
Leo Wealth

4.00pm Refreshment & Networking

4.20pm Panel Discussion

The Adoption of Digital Assets & Tokenisation Amongst Private Clients in Asia

- How is the market enhancing and evolving itself after fraud and systemic shocks with unregulated crypto exchanges.
- What is the relevance to private wealth managers and UHNW clients? How should they engage this opportunity?
- What is the correct digital asset strategy? What are the pitfalls?
- How is the regulatory landscape developing?
- What role will Hong Kong now play in the further evolution of the market? What is your plan for digital assets in the next 6 months?
- Why would investors take the risk on digital assets when other asset classes have predictable returns?
- What will be the “breakthrough” asset class for tokenised securities to your company and clients?
- What will be the key factors that lead to the adoption of tokenised securities? How will the adoption curve steepen?
- Why have you made a decision to make digital assets a part of your business strategy?
- What are the key barriers to launching a digital asset strategy for your business?
- What key improvements would you like to see from a business perspective in the digital securities industry?

Chair

Christophe Lee
Founding Partner
JP Asia Partners

	Speaker Lasanka Perera Chief Executive Officer, Singapore Independent Reserve Sean Lawrence Head of APAC Kaiko Elliot Andrews Chief Executive Officer Aspen Digital Kok Hoe Wong Chief Growth Officer Chintai
5.00pm	Forum Ends