Indian Wealth Management Forum 2017

8.40am	Arrival and refreshments

9.00am

Welcome Address

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

9.05am

Keynote Presentation

How can we build capacity and capability in wealth management in India?

Sandip Ghose
Director
National Institute Of Securities Markets

- How do we fill the “white space”?
- Enhancing competency standards
- Creating the right mind-set for future generations

9.15am

Panel Discussion

How can we take the wealth management industry forward in India?

- What’s the future of Private Banking / Wealth Management in India? What will clients want from us in the future?
- What do we need to do to move faster?
- Is there a lack of transparency in fees in Indian wealth management?
- How can you get clients to place greater value on the advice you give them?
- How do we shift the mind-set and educate bankers to actually think about putting the client’s needs first? Should incentives and compensation change?
- How should we differentiate ourselves?
- How do we drive and manage talent acquisition?
- Where will wealth come from in the next 10 years – and how can we get prepared for it?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Rajesh Iyer
Head - Investment Advisory Services and Family Office
Kotak Mahindra Bank

Himanshu Kohli
Founder Partner
Client Associates

Vishal Dhawan
Founder and Chief Executive Officer

Plan Ahead Wealth Advisors

Shuja Siddiqui
Head of Products and Investment Research
L&T Finance

Rohit Bhuta
Chief Executive Officer
Crossinvest

Speaker

10.00am	WealthTalk

Building a future-proof wealth management offering

- The relevance of private banking today in Asia
- The wave of consolidation: will we see more?
- The challenges in building a successful and relevant offering
- How to get your positioning right

Evrard Bordier
CEO and Managing Partner
Bordier & Cie

10.25am Presentation
Building a winning team in wealth management

Anshu Kapoor
President & Head
Nuvama Asset Management

- Culture is everything
- Entrepreneurial expression
- Building an A-Rater team
- Personal growth

10.35am Presentation
YOUR data your identity - analytics driving the digital client

Sandeep Lalwani
Executive Director – Europe and APAC
EbixCash Financial Technology

- Data – the new oil and asset class
- BIG Data – 3Vs (volume, variety and velocity)
- Cognitive and robotics on the data-rich digital client experience

10.45am Presentation
Market trends

Karan Bhagat
Founder, Managing Director & CEO
360 ONE

10.55am Refreshment & Networking

11.25am Presentation

Why does it still make sense for mutual funds to be the core of an investment advice?

Kailash Kulkarni
Chief Executive – Investment Management
L&T Mutual Fund

- Choice of strategies in both equity and fixed income space along with high liquidity
- Alpha generation opportunities in listed space will continue to exist for active MFs given the large universe of stocks and improving depth of the market. Reforms such as GST could also lead to expansion of the listed universe
- MFs will continue to be a product with relatively higher stability given the regulatory restrictions, stringent investment norms, and diverse and stable investor base
- India is very different from developed markets

11.35am Presentation

Driving growth through wealth management

Abhra Roy
Senior Product Line Manager and Head, Finacle Wealth Management
Infosys Finacle

- Strengthening profitability and customer stickiness through client-centric wealth management offerings
- Learning how a unified front-to-back office platform by Finacle can help elevate a wealth management business

11.45am WealthTalk

Gearing up for the opportunities and challenges in Indian wealth management

- Several cross-currents in international and domestic wealth management are affecting the shape of the industry
- Growth and structural changes in the economy provide huge opportunities domestically, albeit amidst uncertainties and challenges
- Imperative to build capacity, employ new tools and raise standards to accelerate development and fully capture opportunities

Shiv Gupta
Founder & Chief Executive Officer
Sanctum Wealth

11.55am WealthTalk

Becoming a true client adviser

ASK Wealth Advisors

- Ethics while managing client portfolios
- Verifying investment suitability
- Why proper advice is not just about managing relationships – even if your views are contrary to those of your clients

12.15pm WealthTalk

New vehicles for Singapore funds

- Existing fund vehicles in Singapore and their limitations
- New proposed vehicle and its benefits

Sunil Iyer
Managing Director, Singapore
IQ-EQ

12.25pm Presentation
Trends in succession planning

Tariq Aboobaker
Managing Director - Trustees
Amicorp Group

- Market trends
- Impact on advising clients

12.35pm Panel Discussion

Wealthy business families in India – how do we meet their needs?

- How does CRS and information exchange create challenges or opportunities for you?
- Is this driving clients to get advice for the first time?
- What is the current level of knowledge and activity around preserving and protecting wealth?
- How should clients think about succession planning? What solutions do they use?
- How can we drive more effective and specific conversations about insurance and other products or structures for inter-generational wealth transfer?
- The next generation – how do we meet their needs?
- Who are the right professionals and advisers for families to engage? And how should they choose between them?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Arpita Vinay
Executive Director
Centrum Wealth Management

Gautami Gavankar
Principal Advisor, Estate Planning
Kotak Mahindra Trusteeship Services

Munish Randev
Chief Investment Officer
Waterfield Advisors

Umang Papneja
Managing Partner & Chief Investment Officer
IIFL Investment Managers

Tarun Birani
Founder and Chief Executive Officer
TBNG Capital Advisors

Shanker Iyer
Chairman
The Iyer Practice

Speaker

1.25pm	Lunch & Networking	

1.25pm Lunch & Networking

2.10pm WealthTalk

Building trust – 'ethics' at the core of wealth management

- We are united by our mission to make a successful career in the 'wealth' space
- With strong macro tailwinds, and a stable government with a promise of transformational reforms, India's expected trajectory of growth over the next decade or more is bound to translate into enormous wealth creation. India, and we, in the wealth space, are poised for greater opportunities
- To harness these opportunities and build our careers, we need to balance business interests with client interest in the most trustworthy manner
- The core of this business is the client-adviser relationship – which is built on 'trust'. A trust deficit can mar all the opportunities that a growing wealth industry provides. Ours is a fiduciary responsibility that requires us to put the clients' interests first
- Thus, ethical practices of participants in the industry is one of the most critical factors for a sustainable, enriching wealth industry – central to our career growth too

Atin Kumar Saha
Managing Director & Head Wealth Management Coverage, India
Deutsche Bank Wealth Management

2.20pm Panel Discussion

Are we really ripe for disruption?

- What's the role of digital today in wealth management in India?
- What impact will technology really have on the industry – now and in the future?
- How far do platforms and propositions need to evolve and digitise?
- What systems, solutions and other tools are making a difference in the client experience?
- Do we have adequate tools to engage customers?
- Why are customers flocking to large robo-advisers in the West? What will drive adoption of robo-advisers in India?
- Can robo-advisers, fintechs and AI transform the industry?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Satheesh Krishnamurthy
Senior Vice President, & Business Head - Affluent & NRI
Axis Bank

Kanwar Vivek
Senior President - Head Wealth Management & YES First Branch Banking

YES Bank

Anupam Guha
Head, Private Wealth Management
ICICI Securities

Bhavesh Sanghvi
Executive Vice President & Head Wealth Management
Aditya Birla Finance

Kunal Bajaj
Founder, Chief Executive Officer
Clearfunds

Speaker

3.05pm Presentation

The technology wake-up call for the buy-side: top 3 priorities for optimal performance

Erdem Ozgul
Managing Director
Numerix

- Increasing market complexity and other challenges are putting pressure on the buy-side to streamline their operations, enhance efficiency and improve functionality – from the front to the back office
- As a result, the technology needs of today stretch across software, hardware and infrastructure

3.15pm WealthTalk

Accessing the multi-family office opportunity

- What is a multi-family office?
- Why did you set up your firm?
- How has that model evolved in Asia?
- What is the potential opportunity for firms to collaborate with you?

Mandeep Nalwa
Chief Executive Officer, Asia & Middle East
Taurus Wealth Advisors

3.25pm WealthTalk

Taking Asia's independent community to the next level

- What's the opportunity for independent/external asset management firms in Asia?
- How to drive growth and greater industry collaboration

Rohit Bhuta

3.35pm Refreshment & Networking

4.05pm WealthTalk

Creating growth via new investment opportunities

- As per the current state of Indian economy – the country's asset management industry is predominantly traditional equity, fixed income and liquid assets, with expectations of capital appreciation, dividends and interest earnings.
- What are the new growth opportunities in India vis-à-vis a global scenario – especially given the growing UHNI/HNI wealth?

Radhika Gupta
Chief Executive Officer
Edelweiss Asset Management

4.15pm WealthTalk

Evaluation of risk management in equity allocation

- Evaluation of risk is as important as returns when investing in the equity asset class
- How to measure risk in equity products?
- Analysis beyond ratios

Rajesh Kothari
Founder and Managing Director
AlfAccurate Advisors

4.25pm WealthTalk

The demise of alpha in large-cap mutual funds in India

- Low level of consistency in the performance of large-cap equity mutual funds
- Sharp reduction in alpha generated by large-cap equity mutual funds

Saurabh Mukherjea
Chief Executive Officer
Ambit Capital

4.35pm Panel Discussion

How do we develop the advisory proposition and the quality of the client engagement?

- How can you deliver a relevant, advisory-led, outcome-based approach for your clients?
- How are SEBI's investment adviser regulations impacting the market?
- What's the way forward for how product manufacturers and fund selectors should partner with each other going forward?
- What can be done to facilitate mutual fund distribution in a more meaningful way?
- How do we ensure we provide more relevant and targeted product and investment offerings to our clients?
- How do we now expand the asset management business?
- How do we improve financial literacy – even for clients with a high level of investable assets? What do we stand to gain from doing this?
- How will investors generate performance in 2017?
- What are the biggest risks for 2017?

Chair

Michael Stanhope
Chief Executive Officer & Founder
Hubbis

Panel members

Sirshendu Basu

Head - Managed Investments and Product Management
Standard Chartered Bank

Gaurav Arora
Chief Investment Officer
ASK Wealth Advisors

Nipun Mehta
Founder and Chief Executive Officer
BlueOcean Capital Advisors

Ashish Shanker
Head - Private Wealth Investment Advisory
Motilal Oswal Wealth Management

Guneet Singh
Senior Director & Head of Sales - Private Banking and Wealth Management
IDFC Bank

Tushar Pradhan
Chief Investment Officer, India
HSBC Global Asset Management

Pranab Unyal
Head of Products and Advisory Desk
Ambit Private Wealth

Speaker

5.30pm	Forum Ends