Investment Solutions Forum 2019

8.40am	Registration
8.55am	Welcome Address Michael Stanhope Founder & Chief Executive Officer Hubbis
9.00am	Panel Discussion Big Opportunities / Big Challenges • What's your USP? • What have you got that means you will still 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? • 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 Richard Straus Senior Managing Director, Head of Private Banking - Hong Kong EFG International Jean-Louis Nakamura Chief Investment Officer, Asia Pacific - Chief Executive Officer, Hong Kong Lombard Odier Dr. Silvio Struebi Partner Simon-Kucher Global Strategy Consultancy Stewart Aldcroft Langley Castle Consulting Michael Benz Senior Advisor Synpulse
9.45am	Presentation The China Potential & ETFs Tactical Play

Louis Lu
Head of Quantitative and Alternative Investment Department
CSOP Asset Management

- Leveraged & Inverse ETP in HK
- Trading Strategies
- China opportunities play

9.55am

Presentation
Finding complementary income sources in a low yield environment

Donald Amstad
Global Head of Client Growth
abrdn

We live in uncertain times.

- Political
- Economic
- Financial
- Bond yields are collapsing - $16tr bonds with a negative ytm
- Only USD bonds have a positive yield
- Within USD bonds, EM corporate bonds offer the best risk/return

FOR UNCERTAIN TIMES : BUY USD EM FMP

10.05am

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

Aleksey Mironenko
Partner & Chief Distribution 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 will revenue come from in the future?
- Who will thrive in the future? Who will be disintermediated?
- Will traditional PBs be squeezed in terms of managing liquid (global equity and bond) portfolios due to technology-driven developments?
- Can PBs remain relevant by focusing on areas that aren't easily replaced by technology—illiquid and privates, cheap leverage, better (if possible) portfolio advice?
- Do we need to engage more passive products & ETFs?
- Whats the role of technology and digital evolving?
- How do you prove you are delivering performance?
- How should you balance revenue with suitability and the client's best interest?
- Can digital add greater value to traditional advisory?

Chair

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

John Robson
Chief Commercial Officer
Quantifeed

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Tony Wong
Head of Intermediary Sales
CSOP Asset Management

Tobias Bland
Chief Executive Officer
Enhanced Investment Products

Terence Goh
Co-Founder & Chief Executive Officer
Bam Fintech

Simon Ree
Founder
Tao of Trading

11.00am	Refreshment & Networking
11.30am	Presentation Do-It-Yourself Wealth Management: Using Technology to Access Professionally Managed Global Diversified Portfolios Cheaply and Efficiently

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

- Combination of managed account technology and ETFs allow individual investors to have global, diversified portfolios managed professionally in their own accounts with full transparency in an efficient and low cost manner.
- We provide some examples of this do-it-yourself wealth management.

11.45am	Presentation Beware of Greenwashing as ESG Momentum Builds

Andrew Daniels
Senior Analyst, Manager Research
Morningstar

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

11.55am

Presentation
The GCC – the new Emerging Market countries

Ryan Lemand
Senior Executive Officer, ADSI & Global Head of Wealth and Asset Management, ADS Securities
ADS Investment Solutions

- The Gulf Cooperation Council Countries (GCC) are being upgraded to Emerging Markets by major indices, creating a new type of Emerging Markets
- GCC countries are oil exporting, with currencies pegged to the dollar, high foreign currency reserves and very low debt-to-GDP
- Momentum investing into GCC stock markets has proven to be quite lucrative for traditional Emerging Market investors

12.05pm

Presentation
Scaling wealth management with digital automation

John Robson
Chief Commercial Officer
Quantifeed

- Scaling to thousands of customers with rising wealth is exciting and challenging
- The threat of failing to do so is immense
- The answer is automation and a local market perspective

12.15pm

Panel Discussion

"Young Clients" - 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

Janet Li
Asia Wealth Business Leader
Mercer

Aleksey Mironenko
Partner & Chief Distribution Officer
Premia Partners

Entela Benz
CEO and Co-Founder
Intensel- Climate Risk Solutions

Sunita Subramoniam
Vice President, Product Strategist - iShares
BlackRock

1.00pm Lunch & Networking

1.50pm Workshop

Investing during trade war: uncorrelated equities and truly risk-free cash

David Lai
Partner & Co-CIO
Premia Partners

Aleksey Mironenko
Partner & Chief Distribution Officer
Premia Partners

Throughout 2019 we've been whipsawed by trade war back and forth between China and the US. While many investors are inclined to de-risk and wait it out, the last month has shown that remaining uninvested has its costs too. Instead, a more appropriate strategy may be to a) identify the equity winners regardless of trade war outcome, b) minimize correlations and c) identify truly risk-free assets as a hedge for the doomsday scenario.

- An introduction to Premia Partners and our goal to improve Asian beta
- Why trade war winners are closer than we think – China New Econ and Vietnam are the places to be
- Why not all cash solutions are the same – Treasury Floating Rate Notes as a risk-free cash alternative

2.30pm Workshop

Index and Quant Investing in Asian Markets (Or why should I care about factors, smart beta and dynamic risk management)

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Factor / smart beta investing and dynamic risk management are widely used investment approaches in developed markets, but their adoption in Asia has been slow. We discuss why Asian investors would be wise to understand some of these investment strategies and techniques.

You should attend this workshop if you want to participate in a practical, hands on discussion about passive investment, smart beta, and better risk management and diversification to improve investment performance while reducing risk in Asian equity markets.

Harold Kim, Founder and Chief Executive Officer of Neo Risk Investment Advisors, will be discussing reasons for the popularity of these strategies in global markets and sharing some of his thoughts on the recent performance of Asian markets and ways active risk management and factor exposure can improve performance.

3.10pm 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

Michael Stanhope
Founder & Chief Executive Officer
Hubbis

Speaker

Simon Godfrey

Independent Financial Advisor

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

Jacky Tang
Head of Portfolio Management Group Asia, Co-Head of Investment Strategy Group Asia
Goldman Sachs

Harold Kim
Founder and Chief Executive Officer
Neo Risk Investment Advisors

Angel Wu
Managing Director, Head of Product Management Group
Bank of Singapore

4.00pm	Forum Ends