Agenda

8.45am **Registration**

9.00am **Introduction**

Hansi Mehrotra
Managing Director, India
Hubbis

9.05am **Welcome address and market outlook**

S Naganath
President and Chief Investment Officer
DSP BlackRock

9.20am **Panel discussion**
CEO panel – perspectives on leveraging India's potential

- Distribution versus advice - how will current processes at institutions need to change?
- What product innovations, tools or platforms could help facilitate an ongoing fee model?
- Marketing financial products in the mass segment. The government has announced the Rajiv Gandhi scheme, divestments, direct plans and incentives to increase penetration - what are the industry-s views on these? What alternative suggestions does the industry have?
- The role of financial portals

Chair

Hansi Mehrotra
Managing Director, India
Hubbis

Panel members

Nitin Rao
Senior Executive Vice President - Private Banking Group & Third Party Products
HDFC Bank

Kamlesh D Rao
Senior Executive Vice President - Priority Banking Group & Third Party Products
Kotak Mahindra Bank

Prathit Bhobe
General Manager - Wealth Management & Privilege Banking
ICICI Bank Limited

Vishal Kapoor
General Manager, Wealth Management and Priority & International Banking, South Asia
Standard Chartered Bank

Agenda

Rajiv D Bajaj
Vice Chairman & Managing Director
Bajaj Capital

Neeraj Choksi
Joint Managing Director
NJ Group

Sudhakar R
Managing Director, Aditya Birla Money
Chief Executive Officer, Aditya Birla Money Mart

Dhruv Mehta
Director
Foundation of Independent Financial Advisers (FIFA)

10.20am **Presentation**
Insurance solutions covering mortality, morbidity and annuity

Sujeet Kothare
Senior VP - Sales Strategy and Digitisation
ICICI Prudential Life Insurance

10.45am **Presentation**
Risk profiling

Paul Resnik
Founder
Finametrica

- Investors' risk profile is at the heart of "client suitability" – for both distribution and advice
- Risk tolerance should be psychometric and applied consistently across firms
- Experiences from other markets

11.15am **Refreshments & networking**

11.35am **Presentation**
Wealth allocation – using behavioural finance

Hansi Mehrotra
Managing Director, India
Hubbis

- Investors only discuss part of their wealth with advisers; how can advisers include other assets in the discussion?
- A possible framework using behavioural finance concepts

11.50am **Presentation**
Multiple rewards of multi-asset class investing

R Sivakumar
Head - Fixed Income & Products
Axis Mutual Fund

- For retail investors, multi-asset class funds are simpler and effective solutions as potentially the core of portfolios
- Multi-asset class funds can offer absolute returns, lower costs and tax efficiency

12.15pm **Presentation**
Lifecycle solutions from accumulation to retirement

Amish Munshi
Senior Fund Manager
Tata Mutual Fund

- Investors have access to range of multi-asset class funds with different risk profiles
- Range cover lifecycle from young accumulator to safety conscious retiree

12.40pm **Panel discussion**
Training – what is needed to deliver wealth management services?

- What training / certification does the industry need to deliver these services?
- Cost effective ways to train on a large scale
- What do NISM / FPSB offer?

Chair

Hansi Mehrotra
Managing Director, India
Hubbis

Panel members

Pushkar Chugh
Vice President - Knowledge Management
FPSB India

Vikas Arora
Business Head - Investments & Insurance, Private and Business Clients
Deutsche Bank AG

Chandan Roychoudhury
Head L&D, Global Consumer Bank
Citibank

Agenda

Kanwar Vivek
Head Wealth Management, Broking & Property Services
Capital First

Kanak Kr Jain
President
ASK Circle

Gaurav Mashruwala
Certified Financial Planner

1.15pm **Lunch**

2.00pm **Presentation**
Asset allocation with building blocks

Aashish Somaiyaa
Chief Executive Officer
Motilal Oswal Asset Management Company

- While multi-asset class funds suit retail investors, affluent investors may like bit more flexibility in their asset allocation and access to products
- How can a discretionary platform help advisers implement asset allocation?

2.25pm **Presentation**
Fixed income

S Naren
Chief Investment Officer - Equity and Fixed Income
ICICI Prudential Asset Management Company

- Taking fixed income products to retail investors
- Understanding credit risk in Indian context
- Duration, credit or spreads - Striking the right pay-off
- Product innovation in fixed income - some opportunities

2.50pm **Presentation**
Equities – how to include in portfolios

Mahesh Patil
Co-Chief Investment Officer
Birla Sun Life Asset Management Company

- Why equities are the cornerstone of every portfolio
- How to market equities as part of a portfolio when markets are down

3.15pm **Presentation**
Equities – what to include in portfolios

Anup Maheshwari
Executive Vice President and Head of Equities
DSP BlackRock

- Different style of equity investing – active v passive
- How many equity funds to include in a portfolio

3.40pm **Refreshments & networking**

4.00pm **Panel discussion**
Product platforms - where to from here?

- Banks and wealth firms have research set-ups; how do IFAs conduct research?
- Feedback on products available for mass/affluent investors
- How do advisers select products to construct portfolios?
- Role of ratings

Chair

Hansi Mehrotra
Managing Director, India
Hubbis

Panel members

Surajit Misra
Executive Vice President
Bajaj Capital

Misbah Baxamusa
National Sales Head
NJ Group

Deepak Vazirani
Head – Wealth Management West & South
Karvy Private Wealth

Sumeet Vaid
Founder & Chief Executive Officer
Ffreedom

Rishi Nathany
Chief Executive Officer
Dalmia Securities

Ashish Malaviya
Head - Investments & Relationship Management (Select)
IndusInd Bank

Ramesh Bhat
IFA Galaxy

5.00pm **Forum ends**