

*Virtual  
Conference*



**CFA Society  
India**

# 12TH INDIA INVESTMENT CONFERENCE

**ERA OF DISEQUILIBRIUM**

**21-22 January 2022**

**#IndInvConf**

Hosted by CFA Society India

**SPONSORSHIP OPPORTUNITIES**



## EVENT OVERVIEW

Technological innovation and changing demographics are among the many forces that have taken disruption to unsurpassed levels. In addition, there is a growing awareness that it is not just profits but responsible profits that matter. Unexpected events can make investing even more difficult. The India Investment Conference, jointly hosted by CFA Society India and CFA Institute, offers a unique forum to network, learn and deliberate on these and many other challenges and opportunities we face. Register now – come listen to some of the biggest thought leaders of our times.

### About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organisation is a champion of ethical behaviour in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow.

### About CFA Society India\*

CFA Society India (Indian Association of Investment Professionals), established in April 2005, is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisers, and other financial professionals. As one of the over 150 CFA Institute member societies, CFA Society India connects local members to a global network of investment professionals. The key objectives of CFA Society India are to promote ethical and professional standards within the investment industry in India and to facilitate the exchange of information and opinions among people within the local investment community and beyond. CFA Society India also works to further the public's understanding of the CFA® designation and the investment industry.

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#### Top Employers of CFA® Charterholders Globally:

Bank of America Merrill Lynch · BlackRock · BMO Financial Group · Credit Suisse · HSBC · JPMorgan Chase · Royal Bank of Canada · TD Bank Financial Group · UBS · Wells Fargo

#### Top Employers of CFA® Charterholders in India:

Ambit Group · Citigroup · CRISIL · Deutsche Bank · Goldman Sachs · HSBC · ICICI Group · JP Morgan Chase · MSCI · State Bank of India

## CONTACTS

To secure any of these opportunities and gain access to investment management professionals attending the India Investment Conference, please contact:

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Director, CFA Society India | krisbags@gmail.com



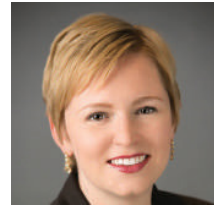
## DISTINGUISHED SPEAKERS (FROM PAST CONFERENCES)



**Peter Berezin**  
Chief Strategist,  
BCA Research



**Rupal Bhansali**  
Chief Investment Officer,  
International and Global  
Equities Portfolio Manager,  
Ariel Investments



**Heather Brilliant, CFA**  
CEO & President,  
Diamond Hill Capital  
Management



**Robert P. Browne, CFA**  
Executive VP and Chief  
Investment Officer,  
Northern Trust



**Ashvin B. Chhabra**  
President,  
Euclidean Capital



**Aswath Damodaran**  
Professor of Finance  
Leonard N. Stern School of  
Business,  
New York University



**Sir Howard Davies**  
Chairman  
Royal Bank of Scotland



**Mihir Desai**  
Mizuho Financial Group  
Professor of Finance,  
Harvard Business School;  
Professor of Law, Harvard  
Law School



**Anil Gaba**  
Professor of Decision  
Sciences and the Orpar  
Chaired Professor of Risk  
Management, INSEAD



**Carla Harris**  
Vice Chairman, Managing  
Director, Senior Client Advisor,  
Morgan Stanley



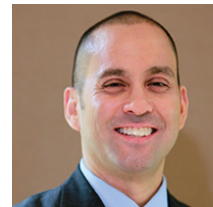
**Morgan Housel**  
Partner,  
Collaborative Fund



**Richard Koo**  
Chief Economist,  
Nomura Research Institute



**Dr. Vikram Kuriyan, CFA**  
Director, Investment Lab  
Indian School of Business



**Joel Litman**  
President and CEO  
Valens Research & Chief Inv.  
Strategist of Altimetry



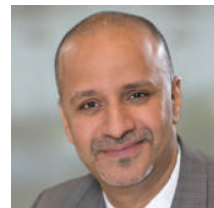
**Philippa Malmgren**  
President and founder,  
DRPM Group  
Co-Founder, H Robotics



**Russell Napier, ASIP**  
Independent Strategist  
and Co-Founder,  
Electronic Research  
Interchange (ERIC)



**Arvind Panagariya**  
Professor of Economics  
Jagdish Bhagwati Professor  
of Indian Political Economy,  
Columbia University



**Manoj Pradhan**  
Founder,  
Talking Heads Macro



**Nouriel Roubini**  
Professor of Economics  
NYU's Stern School of Business  
CEO, Roubini Macro Associates,  
LLC



**Ratna Sahay**  
Deputy Director,  
Monetary and Capital  
Markets Department (MCM),  
International Monetary Fund



## DISTINGUISHED SPEAKERS (FROM PAST CONFERENCES)



**Allison Schrage**  
Economist and Journalist  
Quartz



**Sunil Singhania, CFA**  
Founder, Abakkus Asset  
Manager LLP



**Jonathan B. Stein, CFA**  
Chief Executive Officer and  
Founder, Betterment



**Roger Urwin**  
Global Head of Investment  
Content,  
Willis Towers Watson



**Andy Xie**  
Independent Economist



**Michael J. Mauboussin**  
Consilient Research at  
Counterpoint Global, New York



**Howard Marks, CFA**  
Co-Chairman,  
Oaktree Capital Management



**Chris Mayer**  
Portfolio Manager and  
Co-founder,  
Woodlock House Family  
Capital



**Hiro Mizuno**  
UN Special Envoy on  
Innovative Finance and  
Sustainable Investments



**David M. Rubenstein**  
Co-Founder and  
Co-Executive Chairman of  
The Carlyle Group



**Dr. Grace Lordan**  
Founding Director of  
The Inclusion Initiative,  
Director of the MSc in  
Behavioural Science

## 12TH INDIA INVESTMENT CONFERENCE SPEAKERS



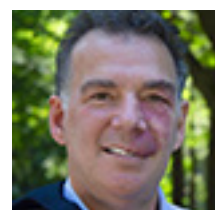
**Xu Sitao**  
Chief Economist,  
Deloitte, China



**Hector Gomez Ang**  
Regional Director for  
South Asia, IFC



**Lauren Templeton**  
Founder & President,  
Templeton and Phillips  
Capital Management, LLC



**William Green**  
Author of Richer, Wiser,  
Happier





# CONFERENCE DELEGATES

Investment professionals attend the India Investment Conference to network with peers; attend educational sessions led by respected industry experts; and learn about new resources, products, and services that are available to assist their performance in their profession.

Our conference delegates are chief investment officers, research analysts, portfolio managers, corporate financial analysts, strategists, investment banking analysts, brokers, traders, risk managers, consultants, and financial advisers who have worked in the investment industry (mostly equities) for more than 10 years. Firms represented include wealth managers, financial advisers, family offices, trust companies, and others involved in the management of private wealth.

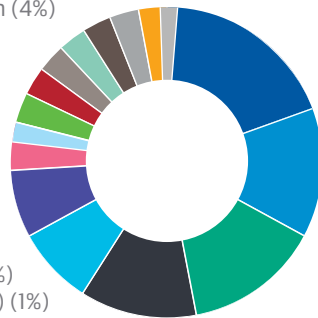
## The demographic profile reflects data from the 2021 India Investment Conference (virtual)

600+

### Delegate Attendance

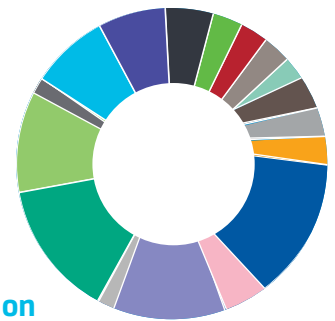
#### Employer Type

- Asset Management/Inv. Firm (29%)
- Business or Knowledge Process (2%)
- University/Educational Institution (4%)
- IT or Software (1%)
- Accounting Firm (2%)
- Manufacturing (2%)
- Brokerage (6%)
- Commercial Bank (7%)
- Consulting Firm (8%)
- Insurance (3%)
- Investment Bank (7%)
- Government or Regulator (1%)
- Private Wealth Mngmnt Firm (15%)
- Utilities (e.g., Oil and Gas, Energy) (1%)
- Credit Rating Agency/Firm/Bureau (1%)
- All Others (12%)



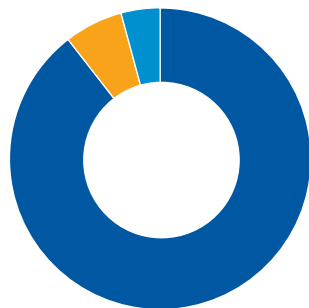
#### Delegate Occupation

- Performance Analyst (1%)
- Relationship Manager/Account Manager (2%)
- Accountant or Auditor (2%)
- Research, Investment, or Quantitative Analyst (22%)
- Portfolio Manager (13%)
- Manager of Managers (3%)
- Chief Executive Officer (6%)
- Risk Analyst/Manager (3%)
- Consultant (7%)
- Corporate Financial Analyst (3%)
- Chief Investment Officer (3%)
- Professor/Academic (3%)
- Investment Consultant (2%)
- Credit Analyst (3%)
- Investment Strategist (4%)
- Financial Adviser/Planner/Wealth Manager (8%)
- Sales Agent (Securities, Commodities, Financial Services) (1%)
- Trader (2%)
- All Others (11%)



#### Region

- America (2.7%)
- Asia Pacific (95.8%)
- EMEA (1.5%)



#### Membership Status



# SPONSORSHIP PROGRAM

## PLATINUM & BOOK SPONSOR

₹ 4 lakhs\*

**30 Complimentary Passes (For Delegates and Staff)**

Platinum sponsor can enjoy great exposure, generate strong sales leads, and raise the firm's profile in the investment community through this opportunity by showcasing your products and services through video commercial to industry decision makers. Platinum sponsor can enjoy brand recognition on the sponsor section of event page, promotional emails, and social media promotion prior to the event, as well as verbal mentioning by the conference chairman and logo exposure during the event & on the LIVE video frame. Platinum Sponsor can showcase the promotional material and products via resource centre. Highlighted as Book Sponsor and a dedicated book sponsor e-mail sent by CFA Society India post the conference. Platinum sponsor logo exposure on the presentation deck at the beginning and the end of the added benefit workshop for delegates.

## GOLD SPONSOR

₹ 2.5 lakhs\*

**20 Complimentary Passes (For Delegates and Staff)**

Gold sponsor can enjoy great exposure, generate strong sales leads and raise the firm's profile in the investment community through this opportunity by showcasing your products and services through resources centre to industry decision makers. Gold sponsor can enjoy brand recognition on the sponsor section of event page, promotional emails, and social media promotion prior to the event, as well as verbal mentioning by the conference chairman and logo exposure during the event & on the LIVE video frame. Gold sponsor logo exposure on the presentation deck at the beginning and the end of the added benefit workshop for delegates.

## SILVER SPONSOR

₹ 1.5 lakhs\*

**10 Complimentary Passes (For Delegates and Staff)**

Silver sponsor can enjoy brand recognition on the sponsor section of event page, promotional emails, and social media promotion prior to the event, as well as verbal mentioning and logo exposure during the event & on the LIVE video frame.

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# SPONSORSHIP PROGRAM

\*Exclusive of GST

SPONSORSHIP AND EXHIBIT OPPORTUNITIES	Platinum Sponsor	Gold Sponsor	Silver Sponsor	Book Sponsor
<b>Price (in INR, exclusive of GST)</b>	<b>₹ 3.5 lakhs</b>	<b>₹ 2.5 lakhs</b>	<b>₹ 1.5 lakhs</b>	<b>₹ 1 lakh</b>
<b>Deliverables</b>				
<b>Sponsored Corporate Presentation / Video Commercial</b>				
Video Commercial - A one-minute sponsor's video to be played during break between sessions	•			
Digital recognition on the sponsor section of event page, promotional emails, & social media promotion	•	•	•	•
Verbal mentioning of sponsor by conference chairman at the beginning of each conference day	•	•	•	•
Logo exposure on the presentation deck at the beginning and the end along with exposure on LIVE video frame of the conference	•	•	•	•
Highlighted as Book Sponsor and a dedicated book sponsor e-mail sent by CFA Society India post the conference				•
Sponsors collateral on the resource page of the virtual platform	•	•	•	
Logo Exposure on the presentation deck at the beginning and the end of the added benefit workshop for delegates	•	•		
<b>Delegate Passes</b>				
Complimentary delegate passes to the virtual conference for staff and delegates	<b>30</b>	<b>20</b>	<b>10</b>	

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## DELEGATE Sponsor Package

Number of Delegate	Package		Early Bird	Regular Fee
	20	40	21 December 2021	
Special Rate per delegate (inclusive of taxes)	INR 900	INR 750	INR 1200	INR 1500
<b>Additional Benefit</b>				
Company logo on conference website	•	•	•	•
Company logo on housekeeping slide	•	•	•	•

Delegate Registration (Inclusive of taxes)	Early Bird*	Regular Fee
Members of CFA Society India	Free	Free
Member of CFA Society other than India	Free	Free
Passed Level III of the CFA Program	INR 960	INR 1200
CFA® Program Registered Candidates	INR 960	INR 1200
Non-Members	INR 1200	INR 1500

\*Prices cover all 3 days of the conference.

\*Early bird offer ends on 21 December 2021.

### Deadlines for Enrollment and Submission

Enrollment in sponsorship package	<b>7 January 2022</b>
Submission of company logo and description	<b>14 January 2022</b>
Delegate details for complimentary delegate pass and working pass	<b>17 January 2022</b>

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## DAY 01 | Friday, 21 January 2022

5:00 PM - 5:05 PM

## Conference Chair

**SHAMIT CHOKSHI, CFA**

Chairperson, Professional Learning, CFA Society India

5:05 PM - 5:10 PM

## Welcome address

**RAJENDRA KALUR, CFA**

Director, CFA Society India

5:10 PM - 6:10 PM

## Investing the Templeton Way in a Post Covid world

**LAUREN TEMPLETON**Founder & President, Templeton  
and Phillips Capital Management, LLC**SUNIL SINGHANIA, CFA (Moderator)**

Founder, Abakkus Asset Manager LLP

*John Templeton pioneered global investing, but his practice of bargain hunting & contrarian methods propelled his excess returns. In this discussion we will examine the timeless principles that guided decades of market-beating returns.*

6:15 PM - 7:15 PM

## The Traits, Strategies, Habits, and Principles of Winning Investors

**WILLIAM GREEN**Author, Richer, Wiser, Happier:  
How the World's Greatest Investors  
Win in Markets and Life**DURGESH SHAH (Moderator)**

Director, Corporate Database

*William Green, the author of Richer, Wiser, Happier: How the World's Greatest Investors Win in Markets and Life, will discuss some of the key lessons he's learned while interviewing investment legends such as Charlie Munger, Mohnish Pabrai, Howard Marks, Bill Miller, Nick Sleep, Jack Bogle, Peter Lynch, and Sir John Templeton.*

7:15 PM - 7:45 PM

## Networking session with William Green

## DAY 02 | Saturday, 22 January 2022

10:30 AM - 10:35 AM

## Conference Chair

**MONIKA CHOPRA, CFA**

Chairperson, Career Services, CFA Society India

10:35 AM - 11:35 AM

## Impact investing in a Turbulent Market

**HECTOR GOMEZ ANG**Regional Director,  
South Asia, IFC**ASHU SUYASH (Moderator)**Entrepreneur and Independent  
Director ( Ex MD & CEO CRISIL)

*More than \$2.3 trillion was invested for impact in 2020 amid the turbulence caused by COVID-19. Impact investment has emerged as a significant opportunity to mobilize capital into investments that target measurable positive social, economic, or environmental impact alongside strong financial returns. IFC's experience as an impact investor for over six decades brings crucial lessons which other investors can benefit from.*

11:40 AM - 12:40 PM

## China in the Post-Covid Era: Global &amp; Regional Implications

**XU SITAO**Chief Economist,  
Deloitte, China**NEELKANTH MISHRA (Moderator)**Managing Director, Co-Head of  
Equity Strategy, Asia Pacific and  
India Equity Strategist,  
Securities Research, Credit Suisse

*How will China revamp its growth model which has relied on stable external demand? What will be the economic and geopolitical implications for India should China rebalance its growth more towards consumption?*

12:40 PM - 01:10 PM

## Networking Session with Xu SiTao