

7TH

INDIA WEALTH MANAGEMENT CONFERENCE

Beyond Goldilocks, Is This An Opportunity To Shine?

#INWealth

AGENDA

TUESDAY, 9TH AUGUST 2022

● **CONFERENCE CHAIR**

KISHOR BAGRI, CFA

Director, Professional Learning Committee, CFA Society India

8.30 AM - 9.00 AM ● **REGISTRATION**

9.00 AM - 9.20 AM ● **CONFERENCE OPENING & REMARKS**

ABHISHEK LOONKER, CFA

Director, CFA Society India

MARGARET FRANKLIN, CFA

President & CEO, CFA Institute

9.20 AM - 10.20 AM ● **KEYNOTE ADDRESS**

NAVNEET MUNOT, CFA

MD & CEO,
HDFC Asset Management Company Limited,
Director, CFA Society India

AASHISH P. SOMAIYAA (MODERATOR)

Chief Executive Officer,
WhiteOak Capital Mutual Fund

10.20 AM - 10.40 AM **NETWORKING BREAK & TEA BREAK**

10.40 AM - 11.40 AM ● **THE CHANGING LANDSCAPE OF WEALTH MANAGEMENT INDUSTRY**

KARAN BHAGAT

Founder, Managing Director
and Chief Executive Officer,
IIFL Wealth & Asset Management

ANIL GHELANI, CFA (MODERATOR)

Head of Passive Investments & Products
DSP Mutual Fund, Director, CFA Society India

11.40 AM - 12.40 PM ● **THE RETURNS CONUNDRUM: IS YOUR STRATEGY, RIGHT?**

LARRY SWEDROE

Chief Research Officer,
Buckingham Wealth Partners

RAJEEV THAKKAR, CFA (MODERATOR)

Chief Investment Officer & Director,
PPFAS Asset Management Private Limited

12.40 PM - 2.00 PM **NETWORKING + EXTENDED LUNCH**

2.00 PM - 3.00 PM ● **HOW SERIOUS IS THE RISK OF MACROECONOMIC ACCIDENTS?**

NEELKANTH MISHRA

Managing Director, Co-Head of Equity Strategy,
Asia Pacific and India Equity Strategist,
Securities Research, Credit Suisse

SHAMIT CHOKSHI, CFA (MODERATOR)

Chairperson, Professional Learning
Committee, CFA Society India

3.00 PM - 3.30 PM **NETWORKING BREAK + TEA BREAK**

3.30 PM - 4.30 PM ● **AMERICA'S LEAD ON MEGA-SIZED COMPANIES: IS A PEAK NIGH?**

RITIKA MANKAR, CFA

Strategist (Global Investment Strategy),
BCA Research

BIHARILAL DEORA, CFA, (MODERATOR)

CIPM
Director, Abakus Asset Manager LLP
Director, CFA Society India

4.30 PM - 5.00 PM ● **CLOSING REMARKS**

PRIYANKA MATHUR

COO, CFA Society India