Global Asset Allocation and Manager Selection Summit 2018

Morning Session:

Organizer: AIMA, Voleen

Special Guiding Organization: IAMAC

Co-sponsors: Eurex, Oriental Patron, Wisdom Fin-Tech

Special Supporting Organization: Bloomberg, QuantFlix, OHFI

Venue: JW Marriott Hotel Shenzhen

Date: 16th November, 2018

Language: Chinese, English (Simultaneous Translation Equipped)

Participants: Investment Research/Asset Management and Portfolio Management/Risk Control Professionals from China Insurance Companies, Global Asset Management Institutions

Number of Participants: 40 - 50

Agenda

Time	Description
Morning	
8:30 – 9:00	Registration
9:00 – 9:20	Opening Address - IAMAC
9:20 – 9:45	Keynote Speech: Outlook of Global Asset Allocation – Blackrock
9:45 – 10:10	Keynote Speech: Outlook of Global Bonds Investment - PIMCO
10:10 – 10:35	Keynote Speech: Outlook of Alternative Investment – Cambridge Associates
10:35 – 10:50	Coffee Break
10:50 – 11:15	Keynote Speech: Outlook of Global Private Equity Investment – Carlyle Group
11:15 – 11:40	Keynote Speech: Private Debt and Infrastructure Investment - TBD
11:40 – 12:30	Panel Discussion: Strategic Thinking Over Multi-Asset Allocation- UBS Asset Management, Franklin Templeton, JP Morgan, Schroders, Amudi etc.
12:30 – 13:30	Lunch

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Afternoon Session

Topics Focusing On **Trading & Strategy Execution, Manager Selection, Offshore Structured China Strategy, Update on Global Flow and Manager Selection**, to provide a new perspective for the asset allocators, private banking etc centering on the new philosophy of asset allocation, product and manager selection from large overseas asset managers and institutional investors.

Organizer: AIMA, Voleen

Special Guiding Organization: IAMAC (TBD)

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Special Supporting Organization: Bloomberg, QuantFlix, OHFI

Location: JW Marriott Hotel Shenzhen

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Language: Chinese, English (Simultaneous Translation Equipped)

Participants: Investment Research/Asset Management and Portfolio Management, Asset Management Dept. of Chinese Banks, Private Banking, China Mutual Fund Managers, Top China Private Fund Managers, Prime Brokerage/Trading Depts of Global Investment Banks, Global Institutional Investors (Sovereign Funds/Pension Funds/Endowment Funds etc)

Number of Participants: 80 – 100 people

Agenda

Time	Description
Afternoon Session	
13:45 – 14:15	Registration
14:15 – 14:30	Opening Address: AIMA
14:30 – 14:55	Keynote Speech: Strategic Thinking Over Global Business for Chinese Asset Managers: Mercy
14:55 – 15:20	Keynote Speech: Application of Derivatives in Global Asset Allocation - Eurex
15:20 – 15:45	Keynote Speech: Recent Development of Manager Selection Philosophy and Practices– CPPIB
15:45 – 16:00	Coffee Break
16:00 – 16:40	Panel Discussion: Selection of Chinese Fund Managers –Position to Qualify for the Global Investors' Criteria – Representatives from large overseas institutional investors, Moderator: Voleen Panelists: BlackRock Alternative Advisors, GCM, Wisdom-Fintech, Chinese fund managers
16:40 – 17:20	Panel Discussion: The Application and Opportunities of Quantitative Strategy – Moderator: QuantFlix Panelists: SinoPac Asset Mgmt HK, OHFI, K2, Two other large investors (FoF, Endowment/Family offices who have strong interest or real allocation in quant fund, private banking and asset management departments of key China banks(optional)
17:20 – 18:00	Panel Discussion: Product Initiation and Deployment Based on China Strategy – Moderator: DTCC Panelist: Bloomberg, OPIM, Representatives from the Prime Brokerage/Trading Desk. of large global investment banks
18: 00 – 18:30	Closing Speech and Networking