



# Agenda

**15 February 2011**

**8:00 Registration and morning networking**

**8:55 Welcome and opening address**

*Conference Chairman:*

*Jonathan Watkin, conference director, AsianInvestor*

**9:05 Economic address: Macro world economic outlook**

*Marc Faber, editor and publisher of "The Gloom, Boom & Doom Report"*

**9:40 Presentation: Opportunities in Asia - a value perspective**

*Geoffrey Bazzan, head of Asia-Pacific equities, Maple-Brown Abbott*

**10:05 Presentation: Recent developments in QFII & China A - shares market**

*Patrice Conxicoeur, head of institutional business Asia-Pacific, HSBC Global Asset Management, Hong Kong*

**10:35 Morning break**

**10:50 Presentation: Asian equities - increase in weighting in emerging markets and where to from here?**

*Tahnoon Pasha, chief executive officer, Asia equities and fixed income, Aviva Investors Singapore*

**11:15 Panel: How to invest in and manage offshore real estate**

*Moderator:*

*Paul Keogh, managing director, chief investment officer, RREEF Asia-Pacific*

*Panel Members:*

*Mark Ford, chairman, Cbus Property*

*Pete King, portfolio manager, Victorian Funds Management Corporation (VFMC)*

*Mary Power, principal consultant, JANA Investment Advisers*

**11:50 Presentation followed by interview session: Investing in domestically focused emerging markets - the opportunities and the challenges**

*Conrad Saldanha, managing director & portfolio manager for emerging market equities, Neuberger Berman Asia*

*Jame DiBiasio, editor, AsianInvestor*

**12:30 The China economic story and current investment opportunities**

*Yifan Hu, chief economist, managing director, CITIC Securities, China*

**12:50 Lunch and networking break**



- 2:00 Afternoon keynote**  
*The Hon Bill Shorten MP, assistant treasurer and minister for financial services and superannuation, Australia*
- 2:25 Panel: The role of Asia in global asset portfolios**  
*Moderator:*  
*Jame DiBiasio, editor, AsianInvestor*  
*Panel Members:*  
*Marc Faber, editor and publisher of “The Gloom, Boom & Doom Report”*  
*Rob Hogg, senior consultant, Frontier*  
*John Hopper, head of income assets, AustralianSuper*  
*Tim Hughes, investment counsel, NGS Super*  
*Peter Sartori, chief investment officer, Treasury Asia Asset Management*
- 3:10 Presentation: Rediscovering the GEMS - the rise of asian fixed income**  
*Rajeev Mittal, managing director, head of emerging markets & international fixed income PineBridge Investments, London*
- 3:35 Afternoon break**
- 3:45 Panel: Alternative investment themes in Asia, including China**  
*Moderator:*  
*Sam Sicilia, chief investment officer, HostPlus*  
*Panel Members:*  
*Dr. Alexander Blank, vice president, head of Hong Kong office, SCM Strategic Capital Management Asia*  
*Christophe Lee, managing director, FrontPoint Partners, Hong Kong*  
*Michael Halliwell, partner & senior research analyst, Albourne Partners (Asia)*
- 4:20 Presentation: A comparison of future investment opportunities and potential in the BRIC markets - the pros and cons**  
*David Thomas, chief executive officer, Think Global Consulting*
- 4:40 Presentation: A breakdown in China’s export-led growth model : implications for commodities**  
*Diana Choyleva, director, Lombard Street Research*
- 5:00 Closing address**  
*Fiona Reynolds, chief executive officer, Australian Institute of Superannuation Trustees (AIST)*
- 5:15 Cocktails**