CFA Society India

8TH INDIA INVESTMENT CONFERENCE

#IndiaInvConf

AGENDA

Friday, 12 January 2018

Time	Sessions and Speakers
08:30–09:00	**Registration**
09:00–09:20	**Conference Opening and Welcome** **Message on behalf of CFA Society India** **Jayesh Gandhi, CFA** President CFA Society India **Message on behalf of CFA Institute** **Nick Pollard** Managing Director, Asia Pacific CFA Institute
09:20–10:30	**Keynote Address on Global Economic Outlook** **Richard Koo** Chief Economist Nomura Research Institute Moderated by: **TBC**
10:30–11:00	**Networking Coffee Break**
11:00–12:00	**Keynote Address on Contrarian Intrinsic Value Investing (CIVI)** **Rupal Bhansali** Chief Investment Manager, International and Global Equities Portfolio Manager Ariel Investments Moderated by: **TBC**
12:00–13:00	**TBC**
13:00–14:00	**Networking Lunch**
14:00–15:10	**Tools for Maximising your Career Success** **Carla Harris** Vice Chairman, MD, and Senior Client Advisor Morgan Stanley Moderated by: **TBC**
15:10–15:30	**What is Finance For?** **Paul Smith, CFA** CEO and President CFA Institute
15:30–16:00	**Networking Coffee Break**

Time	Sessions and Speakers
16:00–17:30	**TBC**
17:30–17:45	**Closing Remarks** **Vidhu Shekhar, CFA** Country Head, India CFA Institute
17:45	**Conference ends**

Note: Conference agenda and speakers are subject to change without prior notice.

SPEAKERS

Friday, 12 January 2018

CONFERENCE OPENING AND WELCOME

JAYESH GANDHI, CFA

President
CFA Society India

Jayesh Gandhi, CFA, is president of CFA Society India (volunteer) and a senior portfolio manager at Birla Sun Life Asset Management Company. He has over 15 years of experience in equity research and investment and previously served as lead portfolio manager for the India on-shore business at Morgan Stanley Investment Management. Mr. Gandhi holds the chartered accountant designation from the Institute of Chartered Accountants of India, a bachelor's degree in commerce from the University of Mumbai, and a master's in international management from the Thunderbird School for Global Management.

NICK POLLARD

Managing Director, Asia Pacific
CFA Institute

Nick Pollard joined CFA Institute in 2016 as managing director for Asia Pacific. He is responsible for working with all CFA Institute stakeholders, increasing the number of candidates entering and moving through the organisation's credentialing programs, and working with institutional partners (employers) throughout the region. Prior to joining CFA Institute, Mr. Pollard was CEO of The Royal Bank of Scotland's Coutts Asia division and, most recently, he was the Head of International Learning and Professional Development for Coutts International. He earned his BA from University College, London, and is a member of the Private Wealth Management Association.

GLOBAL ECONOMIC OUTLOOK

RICHARD KOO

Chief Economist
Nomura Research Institute

Richard Koo is the chief economist of Nomura Research Institute. He is best known for developing the concept of balance sheet recession, which is now widely used around the world to explain post-1990 Japanese and post-2007 Western economies. Mr. Koo has also advised successive prime ministers on how best to deal with Japan's economic and banking problems. Before joining Nomura, he served as an economist with the Federal Reserve Bank of New York and as a doctoral fellow of the Federal Reserve System board of governors. Mr. Koo has authored many books on the Japanese economy and economics in general, including *The Holy Grail of Macroeconomics: Lessons from Japan's Great Recession* and *The Escape from Balance Sheet Recession and the QE Trap*. Currently, he is serving as a senior adviser to the Center for Strategic and International Studies and as an advisory board member of the Institute for New Economic Thinking. Mr. Koo holds BA degrees in political science and economics from the University of California, Berkeley, and an MA degree in economics from Johns Hopkins University.

CONTRARIAN INTRINSIC VALUE INVESTING

RUPAL BHANSALI

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

Rupal Bhansali is chief investment officer and portfolio manager of international and global equity strategies at Ariel Investments, where she oversees Ariel's New York-based global equities research team. Previously, she served as senior managing director, portfolio manager, and head of international equities at MacKay Shields and as cohead of international equities at Oppenheimer Capital. Ms. Bhansali holds a bachelor of commerce degree in accounting and finance and a master of commerce degree in international finance and banking from the University of Mumbai. She also holds an MBA degree from the University of Rochester.

MAXIMISING YOUR CAREER SUCCESS

CARLA HARRIS

Vice Chairman, Managing Director, and Senior Client Advisor
Morgan Stanley

Carla Harris is vice chairman, managing director, and senior client advisor at Morgan Stanley. Previously at Morgan Stanley, she headed the Emerging Manager Platform, the equity capital markets effort for the consumer and retail industries, and she served as a senior member of the equity syndicate desk and in the mergers and acquisitions department. Ms. Harris has extensive industry experience in the technology, media, retail, telecommunications, transportation, industrial, and health care sectors. She was appointed by President Obama to chair the National Women's Business Council, and she is the author of the books Expect to Win and Strategize to Win. Ms. Harris holds an AB in economics from Harvard University and an MBA from Harvard Business School.

WHAT IS FINANCE FOR?

PAUL SMITH, CFA

President and CEO
CFA Institute

Paul Smith, CFA, leads CFA Institute, a global association of investment professionals that sets the standard for professional excellence and credentials. Mr. Smith has more than 30 years of leadership experience in the asset management industry, including over 18 years in Asia. Prior to joining CFA Institute, he served as chairman and CEO of Asia Alternative Asset Partners. Before that, he was Asia head of securities services at Bank of Bermuda and after the bank's acquisition by HSBC, served as global head of securities services and global head of alternative funds administration in New York. He joined CFA Institute in 2012 as managing director for Asia Pacific and was appointed president and CEO in 2015. Mr. Smith holds a master's degree in history from Oxford University.

CLOSING REMARKS

VIDHU SHEKHAR, CFA

Country Head, India

CFA Institute

Vidhu Shekhar, CFA, is the country head of CFA Institute in India, where he is responsible for advancing the CFA Institute mission in India and supporting CFA® charterholders in the country. He is a seasoned financial and investment professional with nearly 30 years of industry experience in India and abroad. Previously, he served as vice president of new products and business excellence at the National Stock Exchange (NSE) of India, senior vice president at IDBI Capital Markets, and managing director at E*Trade Systems India Limited. Mr. Shekhar also served on various committees contributing to the development of Indian financial markets, including the Dr. Patil Committee on Corporate Bonds and Securitisation and the Raghuram Rajan Committee on Financial Sector Reforms. He holds a bachelor's degree in physics from the University of Delhi and a postgraduate diploma in management from the Indian Institute of Management, Ahmedabad.