IDC ASIA

Private Wealth & Investment Forum

Growth Beyond Borders

Tuesday 6th May, 2025
The Fullerton Hotel

7.30am - 8.40am Registration and Welcome Breakfast

8.40am - 8.50am **Welcome Remarks**

8.50am - 9.25am

Panel Session: Reinforcing the Role of Alternatives in a Diversified Portfolio

In an era marked by macroeconomic shifts and market volatility, traditional investment strategies are being tested like never before. This panel will explore how private wealth can adapt to these changes by reinforcing the role of alternative investments within a diversified portfolio. The session will delve into the benefits of incorporating alternatives to enhance portfolio resilience and achieve stable returns. Discussions will cover how alternatives can mitigate risks associated with market uncertainty, offer opportunities for growth on a global scale, and how private banks / wealth managers are adapting to the demand for alternatives.

With:

- **Rebekah Woo**, *Managing Director - Private Markets and Funds*, **Farro Capital**
- **Mischa Bitton**, *Head of Alternative Investments*, **Standard Chartered**
- **Alan Greenstein**, *CEO*, **Zagga**

Moderated by **Hugh Chung**, CIO, **Endowus**

9.25am - 10.00am

Panel Session: Navigating the Future of Wealth: Innovations, Liquidity, and Global Opportunities"

- Financial Innovation: Explore how innovations in the financial system, such as micro-futures and tokenized assets are reshaping investment strategies and the role of AI and automation in enhancing trading and risk management.
- Liquidity Solutions: Discuss new ways for UHNWIs to access liquidity through structured products and securitised products, and how to use commodities, interest rate swaps, and FX to free up capital.
- Global Commodities Supercycle: Examine the role of energy, metals, and agricultural futures in long-term wealth preservation and growth.
- Private and Public Market Integration: Highlight the intersection of private capital and listed markets, and strategies for integrating listed alternatives into family office and private bank portfolios.

With:

- **Ishan Sarkar**, *Head of Capital Markets SEA*, **HSBC**
- **Bert Verdicchio**, *CIO*, **Vulpes Investment Management**
- **Sachin Patel**, *Executive Director, Metals*, **CME Group**

Moderated by **Vianne Choo**, *Structured Derivatives*, **ADDX**

10.00am - 10.15am **Macro Meets Crypto: Trade Tensions and Monetary Shifts**

Macro landscape and the long-term view for digital assets. Allocating strategically in a selective bull market.

- **Mark Wong**, *Head of Trading*, **Independent Reserve**

10.15am - 10.55am **Networking Break**

10.55am - 11.25am

Fireside Chat: The Future of AI - Insights on Market Dynamics, Investment Strategies, and Emerging Trends

The emergence and evolution of AI in recent years has introduced a truly transformative technology that promises to shape the world as we know it. Such promises have led to a flurry of investments in the sector, fuelling big tech stocks and creating a surge in VC funding. But will AI deliver on its promises?

This fireside chat will look at the current state of AI and the potential impact it will have in the near future. Topics of discussion will include:

- **AI Developments:** Where are we currently at in terms of AI's capabilities and when will the next leap in advancement likely occur?
- **Industry Disruption:** What industries does AI threaten to disrupt and how can this impact investments into these sectors.
- **Investing in AI:** Whether through public markets, venture or private markets, what is the best way to invest in AI?

With:

- **Hsien-Hui Tong,** *Executive Director, Investments,* **SGInnovate**

Moderated by **Jenni Risku**, *Partner & Director,* **Click Ventures**

11.25am - 11.40am

Keynote Presentation: Invest for the Future - Youth Entrepreneurism and the SDGs.

- **Omid Aschari,** *Senior Advisor,* **UN Global Compact**

11.40am - 12.20pm

Roundtable Session 1

1. Capital Preservation & Stability: The Power of Australian Real Estate Private Credit
Host: Alan Greenstein, CEO, Zagga

2. Investing in India's Consumption Story: Private Market Strategies to Capture Middle-Class Growth
Host: Rishika Chandan, Managing Partner, Venturi

3. Navigating risk with futures and options
Host: Lawrence Lee - CIO Continuum Alpha, CME

4. **The Opportunities in Digital Infrastructure & Critical Real Assets** - for Innovation, Growth and Security of the Future
Host: Grace Chung, CIO, TGIM Assets

5. Conviction-based investing: How LPs make the most from their VC allocation?
Host: Amit Zutshi, Founder, Morphosis

6. The Right Time for Digital Assets?
Thematic Discussion

7. Living Capital: Rethinking our role from allocators to architects of impact
Host: Veronika Linardi, CEO, Togs Capital (SEO)

12.20pm - 13.15pm **Lunch Break**

13.15pm - 13.55pm Roundtable Session 2

1. Australian Corporate Private Credit: Risk-Adjusted, Diversified, and Yield-Driven
Host: Christian Brehm, CEO, FC Capital

2. Investing in Growth, Disruption and Change across Large and Small Cap International Markets
Host: Ezra Samet, Senior Portfolio Manager, Redwood Investments LLC

3. The role of HNW insurance in achieving intergenerational wealth transfer and business continuity
Host: Christy Ng, AVP, High Net Worth Relationship, Sun Life

4. Identifying opportunities in private credit
Host: Brandon Suh, Director of Capital Formation - Private Alternatives, Alliance Bernstein

5. Investing With Purpose: Exploring Public Market Solutions in Climate and Impact Investing
Host: Serene Tan, Director, Sustainability Research, Nordea Asset Management

6. Venture Investing in Digital Assets: Navigating Infrastructure, Innovation, and Institutional Readiness
Thematic Discussion

7. Small Capital, Big Change: Solving Global Problems Through Strategic Philanthropy.
Host: Jack Sim (Mr Toilet)

13.55pm - 14.20pm Keynote: Trump 2.0: Implications for China, Asia, and the Global Trade Order

Many South-East Asian economies have benefited from the first round of the US-China trade war, as US imports from China declined and manufacturers diversified their supply chains. But Trump's trade war is just getting started, and the scope of US trade restrictions appears to be expanding. While China remains the primary target, countries with large trade surpluses with the US—including traditional allies—may now find themselves in the firing line.

In this keynote, Marcel Thieliant will examine:

- What other countries should expect from Trump 2.0
- How severely China may be impacted
- Whether South-East Asia can continue to benefit—or will also come under pressure
- What these shifts mean for the future geopolitical and economic landscape

With:

- **Marcel Thieliant** , *Head of APAC*, **Capital Economics**

Panel Session: Interest Rate Strategies - Leveraging Market Insights to Account for Rate Fluctuations

In an environment of fluctuating interest rates, investors are increasingly seeking protection and ways to allocate in order to benefit through periods of volatility. This panel discussion will provide in-depth insights into how interest rate dynamics impact investment decisions and how global investments can help to strategically adapt asset allocation for periods of volatility.

14.20pm - 14.55pm

This session will bring together industry experts to discuss:

- **Market Trends and Rate Predictions:** How to interpret current and forecasted interest rate trends and their implications for investment strategies.
- **Portfolio Adjustments:** Practical approaches for modifying asset allocation in response to rate changes to optimize returns and manage risk.
- **Investment Opportunities:** Identifying and capitalizing on investment opportunities that arise from shifting interest rates.
- **Risk Management:** Techniques for mitigating potential risks associated with rate fluctuations and protecting portfolio value.

With:

- **Ken Sze,** *Head of Investments Asia,* **Barclays Private Bank**
- **Shaz Islam,** *Principal,* **Mercer**
- **Christian Brehm,** *CEO,* **FC Capital**
- **Kunal Chowdhry,** *CEO,* **Apollo Investments (SFO)**

Moderated by **Nishtha Asthana,** *Digital Marketing Entrepreneur and Financial Journalist*

14.55pm - 15.35pm **Networking Break**

Panel Session: Navigating ESG Criteria in Global Markets - Challenges and Opportunities

15.35pm - 16.10pm

As private wealth and family office investors increasingly embrace Environmental, Social, and Governance (ESG) criteria, navigating these standards on a global scale presents both challenges and opportunities. This panel will delve into how ESG considerations are being integrated into investment strategies across different regions and markets. The session will explore the varying ESG standards and cultural environments globally, and discuss the complexities of aligning investments with varying reporting standards. Here, you will gain insights into the practicalities of applying ESG principles across borders, the impact of regional differences on investment decision-making, and emerging best practices for balancing sustainable outcomes with financial performance.

With:

- **Mariam Ashroff,** *Head of Sustainability Asia,* **LGT Private Bank**
- **Howard Ouyang,** *Chief Executive Officer,* **Alba Capital**
- **Andrew Lim,** *Executive Director,* **Presbyterian Community Services (PCS)**

Moderated by **Ann Tan,** *MD,* **CSP Singapore**

How do LPs make 10-15x returns from VC fund investments?

16.10pm - 16.25pm

Conventional VC funds hide poor investment decisions behind excessive diversification and the Power Law Curve. Top-decile fund strategies do not rely on the Power Law. A masterclass for Family offices and institutions on the characteristics of funds that deliver IRRs in excess of 50%.

With:

- **Amit Zutshi**, *Managing Partner*, **Morphosis Venture Capital**

Fireside Chat: Direct Investments - Unlocking Global Opportunities for Family Offices

16.25pm - 16.45pm

Family offices are increasingly turning to direct investments to expand their global reach and diversify their portfolios. This fireside chat will look into the perspectives of a family office and how they can strategically leverage direct investments to take advantage of global opportunities and seek growth from new avenues.

Join us for an in-depth discussion on:

- **Co-Investment Strategies:** Best practices for collaborating with other investors and GPs to share risks and amplify returns on global investments.
- **Navigating Complex Markets:** Insights on overcoming challenges and leveraging local expertise to successfully execute investments in diverse global markets.

With:

- **Alex Ma**, *Managing Director*, **AO Holdings**

Moderated by **Nishtha Asthana**, *Digital Marketing Entrepreneur and Financial Journalist*

16.45pm - 16.55pm **Closing Remarks**

17.00pm - 18.30pm **Cocktails & Networking**