Indian Private Banking
Forum 2012

hubbis

Tuesday 12th June
Taj Lands End, Mumbai

AMICORP
Stand out from the crowd

quant
analysis adds up

ICICI PRUDENTIAL MUTUAL FUND
TARAKKI KAREIN!

DSP BLACKROCK
MUTUAL FUND

MOTILAL OSWAL
Asset Management

TATA
MUTUAL FUND
Expertise that's trusted

THE PHOENIX
MILLS LIMITED

Who is Hubbis?

Launched in March 2010, Hubbis is the leading provider of content and online learning for Asia's Wealth Management & Private Banking Industry.

This is achieved through a highly-functional and relevant training and information portal – with a holistic suite of Wealth Management Training Modules and a cutting-edge Learning Management System – that enables relationship managers (RMs) and financial advisers to become more successful in the region's competitive landscape. And at the same time fulfill their continuing professional development obligations.

Our educational content and other tools are targeted, independent, timely, strategic and Asia-focused. The site is mainly focused on developing skills, product knowledge, and understanding.

Through this practical advice, analysis, insight and information, users gain what's necessary to offer suitable and trusted advice to their clients.

For more information, please contact:

Hansi Mehrotra
Managing Director, India
T 91 22 4070 0371
E hansi.mehrotra@hubbis.com

Roopam Lakhanpal
Head of Business Development, India
T 91 98 2014 6896
E roopam.lakhanpal@hubbis.com

Michael Stanhope
Chief Executive Officer
T 852 2563 8766
E michael.stanhope@hubbis.com

hubbis

Welcome

We are delighted to be hosting our **Indian Private Banking Forum 2012** in Mumbai – to build on the success of our inaugural forum last September.

We are designing this year's event to exclusively focus on the issues, opportunities and challenges in the private banking segment – via in-depth presentations, case studies and free-flowing panel discussions from leading speakers in the local and international markets.

The event is broken in two sessions, to be held in different rooms which will run concurrently. One room is designed as a series of product and skills presentations by leading asset management companies, product manufacturers and vendors for relationship managers and investment advisers. The other room will discuss more strategic industry issues for senior management.

The forum is free for anyone working within a private banking or wealth management organisation to attend. Regulators and industry associations are invited to attend for free as our guest.

Key reasons why you will benefit from attending this forum:

» It is free for anyone at a private bank, a consumer bank, an independent advisory firm or any other type of wealth management organisation
» You get practical insight into how you can do your job more productively and efficiently
» You learn which products are suitable for your clients - and where they fit in their portfolio
» You can understand some of the latest industry and investment challenges - and how you can overcome them
» You can network with peers in an informal and independent setting
» It is an enjoyable and effective learning experience through being interactive and engaging

We look forward to seeing you at the event - and thank you for your support.

Hansi Mehrotra
Managing Director, India
Hubbis

Agenda - Product and Skills Track

8.45am **Registration**

9.00am **Welcome Address**

Hansi Mehrotra
Managing Director, India
Hubbis

9.05am **Panel Discussion**
Is asset allocation dead?

- Are investors questioning the value of strategic asset allocations?
- Should equities still be the cornerstone of portfolios?
- How are private banks convincing investors to diversify?
- What do they do about gold?
- What kind of tactical asset allocation ranges and tilts do investors want?

Chair

Anurag Seth
Head Global Wealth Management
Quant Capital

Panel members

Prateek Pant
Director, Products & Services, Private Banking
RBS

Jignesh Shah
Head of Product and Advisory, India
Sarasin Alpen

Nimish Shah
Head - Investments
Citi Private Bank

K Ramachandran
President - Investment Advisory & Equity Research
Yes Bank

Umang Papneja
President
IIFL Private Wealth Management

Nitin Rakesh
Managing Director & Chief Executive Officer
Motilal Oswal Asset Management

Agenda

9.50am to 11.20am	**Equities session – Old asset class, different perspectives**
	Session Moderator **Satwick Tandon** Director - Global Investment Solutions, India Merrill Lynch Wealth Management
9.50am	**Presentation** **Value investing** **Raamdeo Agrawal** Director Motilal Oswal Asset Management
10.10am	**Presentation** **Optimistic investing** **Bhupinder Sethi** Head of Equities Tata Asset Management
10.30am	**Presentation** **Volatility as a new asset class** **Raghav Iyengar** Executive Vice President - Head Institutional & Retail Business ICICI Prudential
10.50am	**Presentation** **Quantitative investing** **Dr Purnendu Nath** Principal Quant Global Investment Management
11.10am	**Presentation** **DSP BlackRock's view on the Indian equity markets** **S Naganath** President and Chief Investment Officer DSP Blackrock
11.20am	**Refreshments & Networking**
11.40am	**Presentation & Panel Discussion** **Views on fixed income** - Global outlook - Domestic outlook **Presenter** **Dhawal Dalal** Head of Fixed Income DSP Blackrock

Panel chair

Rama Biyani
VP, Fixed Income Market Specialist
RBS

Panel members

Nipa Sheth
Director
Trust Capital

Rudraksh Bhatt
Sales
Darashaw

Bhupendra Meel
Head of Investment Advisory
AK Group

Dhawal Dalal
Head of Fixed Income
DSP Blackrock

12.25pm **Presentation & Panel Discussion**
Sales – What do successful advisers do in their sales technique?

- Being different, being professional, being strategic
- Developing a sales strategy – routes to market
- Developing a sales plan – turning thinking into action
- Managing your pipeline
- Developing existing client relationships – gaining quality referrals
- The sales behaviours that consistently-high performers demonstrate

Presenter & panel chair

David MacDonald
Managing Director, Head of Consulting & Learning Solutions
Hubbis

Panel members

Nitila Natrajan
Executive Director
UBS Wealth Management

Guneet Singh
Head of Sales
HDFC Private Bank

Agenda

Sriram Iyer
Director - Wealth Management
Religare Macquarie Wealth Management

1.05pm **Lunch**

1.55pm **Presentation & Panel Discussion**
Real Estate – The Art of the Deal

- Ultra high net worth investors like investing in real estate, and increasingly directly into individual properties. What trends are we seeing in where they are investing?
- How kinds of deals are being structured?
- What level of due diligence must private banks do as the intermediate party?
- Experiences from structuring and exiting transactions - real estate fund perspective

Panel chair

Amit Sathe
Vice President – Marketing & Sales
Phoenix Marketcity

Presenters & panel members

Parimal Shroff
Lawyer
Parimal Shroff & Co

Naresh Nadkarni
Chief Investment Officer
HDFC Property Fund

Ramesh Nair
Managing Director - West India
Jones Lang LaSalle

2.55pm **Panel Discussion**
Opportunities in Alternatives

- Analysing the AIF guidelines
- Private banks are getting involved in crossing deals within their client base, with the help of boutique investment banking firms. What do RMs need to know about this area to be able to leverage such opportunities?
- Experiences from structuring and exiting transactions

Chair

Nitin Rakesh
Managing Director & Chief Executive Officer
Motilal Oswal Asset Management

Panel members

Munish Randev
Executive Director & Head - Product & Advisory (Wealth Management)
Avendus Capital

Richa Karpe
Co-founder and Executive Director
Altamount Capital Management

Shailesh Haribhakti
Chairman
BDO Consulting

Radhika Gupta
Director
Forefront Capital

Amit Dabas
Director
Guggenheim Partners

Anil Joshi
Mumbai Angels

Agenda

3.55pm	**Refreshments & Networking**

4.15pm **Presentation & Panel Discussion**
Structuring cross-border investments and inter-generational wealth transfers

- What structures and strategies are available to invest cross-border – both inbound and outbound?
- What structures and strategies are available for intergenerational wealth transfers
- What should be the motivations for succession planning, inter-generational wealth transfer and using trusts?
- Are we about to see an explosion around opportunities in estate planning in India?
- What is right way to discuss estate planning issues with clients?
- What are the biggest pitfalls in the succession planning process for families? What is most likely to go wrong?
- What is involved in creating and protecting the value of wealth in a family?
- How can families deal with evolving cultural changes related to gender and geography?

Presenter

Tariq Aboobaker
Estate Planning Director
Amicorp

Panel chair

Sonali Pradhan
Head of Wealth Services, India
RBS

Panel members

Tariq Aboobaker
Estate Planning Director
Amicorp

Navita Yadav
Chief Operating Officer and Head - Business
IL & FS Trust Company

Ashish Khetan
Executive Vice President and Head - Family Office
Kotak Mahindra Bank

Mugdha Sahal
Vice President
IIFL Private Wealth Management

5.15pm **Forum Closes**

9.00am **Welcome Address**

Michael Stanhope
Chief Executive Officer
Hubbis

9.05am **Panel discussion**
Designing the private banking industry for long-term success

- How did the industry evolve in other markets? How is India different?
- What can the private banking industry do now to design its own future?
- To what extent are foreign parent companies rethinking their India strategies?
- What opportunities and challenges does this present for different types of institutions – domestic and foreign? And how can they capitalise on these?
- What's missing within India's private banking market which prevents it from moving to the next level and stage of development?
- What is the outlook for the industry in 2012?

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel members

Atul Singh
Managing Director & Head of Global Wealth & Investment Management, India
Merrill Lynch Wealth Management

Sameer Kaul
Managing Director, Global Market Manager
Citi Private Bank

Stephane Honig
Global Head, Indian Markets
BNP Paribas Wealth Management

Karan Bhagat
MD & CEO
IIFL Private Wealth Management

Sutapa Banerjee
Chief Executive Officer, Private Wealth
Ambit Capital

Rohit Bhuta
Chief Executive Officer
Religare Macquarie Wealth Management

Nitin Rao
Senior Executive Vice President, Private Banking Group & Third Party Products
HDFC Bank

Rajesh Iyer
Executive Vice President & Head - Products and Research
Kotak Wealth Management

10.05am **Panel discussion**
Managing cost to income ratios through managing talent

- Can the sales/advice process be institutionalised? Banks could increase the productivity of their RM force by institutionalising a sales process and offering sales skills training
- What kinds of tools are used for each step of the advice process? Experiences from global private banks on sales processes
- Do clients get somewhat consistent service from different RMs of the same bank?
- Experiences from trying to build talent pipelines
- How can private banks set a higher technical skills/product knowledge standard than the regulatory minimum?
- Are current incentive structures encouraging undesirable behaviours?
- How could the remuneration structures be adapted to balance short term and long term business objective

Chair

Sanjay Sachdev
President & Chief Executive Officer
Tata Asset Management

Panel Members

Vishal Kapoor
General Manager, Wealth Management, South Asia
Standard Chartered

Ashish Kehair
Head of Private Wealth Management & International Business
ICICI Securities

Hrishi Parandekar
Chief Executive Officer
Karvy

Rajesh Saluja
Chief Executive Officer & Managing Partner
ASK Wealth Advisors

Amit Pande
Head - Privee, Private Bank
Axis Bank

David McDonald
Managing Director, Head of Consulting & Learning Solutions
Hubbis

11.20am **Refreshments & Networking**

11.40am **Panel Discussion**

Are private banks in India ready to work with independents?

- How did the external asset managers industry develop in Switzerland and Singapore?
- How do they work with private banks?
- Some banks have been partnering with IFAs informally, but is there a more organised way to rent out their platform within the current regulatory framework?
- What are the main opportunities and challenges in this segment?

Chair

Michael Stanhope
Chief Executive Officer
Hubbis

Panel Members

Dhruv Mehtra
Director
Dhruv Mehta

Mrin Agarwal
Portfolio Advisor
IFA

Aashish Somaiyaa
Sr. VP & Head Retail Business
ICICI Prudential AMC

Debashish Bose
Senior Vice President - Institutional Sales
Quant Capital

12.35pm **Panel discussion**
QFI regulations - opportunities and challenges

Chair

Manoj Jain
Head
ILFS Custody

Panel Members

Atul Singh
Managing Director & Head of Global Wealth & Investment Management, India
Merrill Lynch Wealth Management

Ranjan Bhattacharya
Snr VP & Head, India Custody and Clearing
HSBC Securities Services

Rajesh Cheruvu
Chief Investment Officer, India
RBS

Pankaj Chopra
Chief Executive Officer
Reliance Wealth Management

1.05pm **Lunch**

Business Strategy Track Ends

Visit Product and Skills Track from 1.55pm