

# CAFEMUTUAL CONFERENCE: WEALTH MANAGEMENT 2016

## AGENDA

8.45-9.15 - REGISTRATION

9.15-9.30

*Welcome Address*

*Prem Khatri, Founder & CEO, Cafemutual*

9.30-9.55

*Key note address on The Balancing Act*

*Rashesh Shah, Chairman & CEO, Edelweiss Group*

9.55-10.40

*Ensuring growth & profitability*

*Moderator - Nipun Mehta, Founder & CEO,  
BlueOcean Capital Advisors*

*Arpita Vinay, Centrum Wealth*

*Pradeep Dokania, Vice Chairman, Julius Baer India*

*Hrishikesh Parandekar, CEO, NBFC and Private  
Wealth at Ambit*

*Vishal Kapoor, Regional Head, Wealth  
Management, South Asia, Standard Chartered Bank*

10.40-11.05

*Release of EY report on Wealth Management*

*Abizer Diwanji, Head- Financial Services, EY*

11.05-11.25 - COFFEE BREAK

11.25-11.45

*Managing risk in debt*

**Avnish Jain**, Head - Fixed Income - Debt, Canara Robeco AMC

11.45-12.25

*Robo-advisory - Threat or opportunity*

Moderator - **Kalpen Parekh**, MD, IDFC AMC

**Anant Gupta**, Director-Financial Services, EY

**Omkeshwar Singh**, BSE

**Ravinath Dasika**, Co-founder, Tavaga

**Vineet Arora**, Head - Products & Distribution, ICICI Securities

**Rahul Parikh**, Head Aditya Birla Money MyUniverse

12.25-12.45

*What wealth managers need to know*

*about succession planning*

**Dileep Choksi**, Mentor, WillEffect

12.45-13.05

*Global regulatory trends in mutual funds*

*and how it is impacting India*

**Siddharth Shah**, Partner, Khaitan & Co.

13.05-14.00 - LUNCH

14.00-14.40

*How to thrive in a landscape of heightened  
regulation*

*Moderator - **Nilesh Shah**, MD & CEO, Kotak  
AMC*

***Jignesh Desai**, Founder, NJ India*

***Prathit Bhoje**, Senior General Manager, ICICI Bank*

***Satheesh Krishnamurthy**, Head, Affluent  
Business, Axis Bank*

***Sriram Iyer**, Chief Executive Officer, Wealth  
Management, Religare Private Wealth*

***Vivek Kanwar**, Senior President -Head Wealth  
Management & Global Indian Banking at Yes  
Bank*

14.40-15.20

AIF - new opportunities

***Moderator** - Umang Papneja, President & Chief  
Investment Officer at IIFL Wealth*

***Akshay Gupta**, Group Executive Head & CEO - Asset  
Management, Indiabulls*

***Akshay Mansukhani**, Partner, Malabar  
Investments LLC*

***Gaurav Pant**, Portfolio Manager - DSP BlackRock  
Alternative Investment Fund*

***Sanjay Nath**, Co founder & Managing Partner, Blume  
Venture Advisors*

15.20-15.50 - COFFEE BREAK

15.50-16.20

*Dealing with UHNWIs - lessons for  
wealth Managers*

**Moderator** - Ravi Trivedy, Ex-ED & Country  
Head, FS, KPMG

**Yasho Saboo**, Owner, KDDL (Ethos watches)

16.20-16.40

*Impact of global economic factors on Indian  
fixed income returns*

**R Sivakumar**, Head of Fixed Income at Axis AMC

16.40-17.30

*Roundtable of India's top CIOs*

**Moderator** - **Anup Bagchi**, MD & CEO, ICICI Securities

**Anoop Bhaskar**, Head - Equity, IDFC AMC

**Gopal Agrawal**, CIO/Chief Strategist, Mirae Asset

**Prashant Jain**, Executive Director & Chief Investment  
Officer, HDFC AMC

**S Naren**, Chief Investment Officer, ICICI Prudential  
AMC



June 7, 2016 (Tuesday)  
Sahara Star, Mumbai

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