CFA INSTITUTE
ANNUAL CONFERENCE
13–16 May 2018 | Hong Kong
Hosted with
The Hong Kong Society of Financial Analysts

POCKET GUIDE

#Annual2018
**GENERAL INFORMATION AND HOURS**

**Registration and Information Desk Hours**
- Sunday, 13 May: 12:00–19:00
- Monday, 14 May: 07:30–18:00
- Tuesday, 15 May: 07:30–18:00
- Wednesday, 16 May: 08:00–13:00

**Exhibit Hall Hours**
- Sunday, 13 May: 12:00-17:00; 18:30–19:30
- Monday, 14 May: 08:30–16:15
- Tuesday, 15 May: 08:30–16:15
- Wednesday, 16 May: 08:00–10:45

**ONLINE CONFERENCE INFORMATION**

**Wi-Fi Information**
- **Network**: CFA Institute
- **Username**: Annual2018
- **Password**: Annual2018

**Mobile App**
- **Download Now**: cfainstitute.quickmobile.mobi
- **Username**: Email Address
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**Conference Live**
Visit [annual.cfainstitute.org/live](https://annual.cfainstitute.org/live) to watch conference sessions and access exclusive speaker interviews and discussions of current topics.

**Conference Website**
[annual.cfainstitute.org](https://annual.cfainstitute.org)

**Twitter**
Follow #Annual2018 for live updates from the Annual Conference.
The Hong Kong Tourism Board will be available in the Exhibit Hall on Sunday, 13 May. Visit the HKTB information counter for recommended local attractions, shopping, dining, and discover all the city has to offer.

The Forum is the place to go to connect with fellow delegates, hear firsthand about current CFA Institute initiatives, share your thoughts with staff, and learn about the benefits of membership. The Forum will be busy throughout the conference with online demos, special-interest presentations, and small-group networking.

Sunday, 13 May 2018
18:30 - Women in Investment Management Networking Hour at the Conference Welcome Reception

Monday, 14 May 2018
13:00 - Professional Conduct: Protecting Our Shared Values
Meet and Greet with CFA Institute Professional Conduct Team

13:10 - Brexit, One Year Out: What Does It Mean for Investment Management?

13:40 - Dual-Class Shares: Coming to a Market Near You

Tuesday, 15 May 2018
10:15 - The CFA Institute Members App: Updates and Looking to the Future

13:15 - CFA® Institute Programs: Raising the Standards of Professional Excellence

14:00 - Continuing Professional Development: Raising the Bar

Wednesday, 16 May 2018
08:30 - Charter Benefits: Access Exclusive Educational Resources and Advance Your Career
Meet and Greet with CFA Institute Credentialing Team

14:05 - MiFID II: A New Era for Investment Research?

15:45 - CFA Institute ARX: Premier Hub for Asia-Pacific Investment Research

#Annual2018
SUNDAY, 13 MAY 2018

12:00–17:00
Refreshments
Exhibit Hall, Hall 3F, Level 3

14:00–16:30
THE RESEARCH FOUNDATION WORKSHOP FOR THE PRACTITIONER
Theater 2, Level 1

Alternative Investments: A Primer for Investment Professionals
Keith Black, CFA
Donald R. Chambers

Active Indexing: How ETF Investing Has Impacted Investment Management
Joanne M. Hill

14:00–15:00
"BEYOND THE NUMBERS" CONCURRENT SESSIONS

The Wisdom of Finance: Discovering Humanity in the World of Risk and Return
Mihir A. Desai
Convention Hall A, Level 1

The Art of Stillness
Pico Iyer
Convention Hall B, Level 1

15:30–16:30
"BEYOND THE NUMBERS" CONCURRENT SESSIONS

Creating a Culture of Compliance and Avoiding Ethical Pitfalls
Mary C. Gentile
Donald C. Langevoort
Lim Siong Guan
James Shipton
Tony Tan, CFA, Moderator
Convention Hall A, Level 1

Robot Ethics and the Future of Human–Robot Interaction
Kate Darling
Convention Hall B, Level 1

16:30–17:00
The Research Foundation Networking Reception
Book Signings: Keith Black, CFA; Donald R. Chambers; Joanne M. Hill
Theater Foyer, Level 1

17:00–18:15
PLENARY SESSION

17:00–17:15
Conference Welcome

17:15–18:15
Annual Conference Sunday Keynote: China and India 2025: Changing Dynamics
Haiyan Wang
Hall 3G, Level 3

18:30–19:00
Meet and Greet: Haiyan Wang
Exhibit Hall, Hall 3F, Level 3

18:30–19:30
Women in Investment Management Networking Hour
The Forum, Hall 3F, Level 3

Sponsored by Bloomberg, BOCOM International, and FactSet
**MONDAY, 14 MAY 2018**

**08:00–08:45**
*SPONSORED CORPORATE PRESENTATIONS WITH BREAKFAST*

**Opportunities from Disruptive Technology**
Bloomberg
Steve Man
Convention Hall B, Level 1

**From Wall Street to the World: Understanding How Indices Are Changing the Investment Landscape**
S&P Dow Jones Indices
Jodie M. Gunzberg, CFA
Convention Hall A, Level 1

**Quantitative Shifts in Investment Research**
Thomson Reuters
Tim Gaumer, CFA
Convention Hall C, Level 1

**09:00–12:45**
*PLENARY SESSIONS*

**09:00–09:30**
*Opening Remarks*
The Hon Carrie Lam, GBM, GBS
Chief Executive
Hong Kong Special Administrative Region
of the People's Republic of China

Paul Smith, CFA
President and CEO
CFA Institute
Hall 3G, Level 3

**09:30–10:15**
*Thoughts on Research, Investing, and China's Role in Driving Innovation in Asia and the World*
Lei Zhang
Hall 3G, Level 3

**10:15–10:45**
*Refreshment Break with Exhibitors*

**10:45–11:45**
*Investing in Nigeria: Exploring the Investment Potential of One of Africa's Leading Economies*
Oscar N. Onyema
Hall 3G, Level 3

**11:45–12:45**
*Lessons from the Financial Crisis: A Conversation with Steven Eisman*
Steven Eisman
Hall 3G, Level 3

**12:45–13:15**
*Meet and Greet: Steven Eisman*
Exhibit Hall, Hall 3F, Level 3

**12:45–14:30**
*NETWORKING LUNCH*
Exhibit Hall, Hall 3F, Level 3
Sponsored by ACCA Hong Kong

**13:00–13:30**
*Brexit, One Year Out: What Does It Mean for Investment Management?*
Presented by CFA Institute
The Forum, Hall 3F, Level 3

**13:40–14:00**
*Dual-Class Shares: Coming to a Market Near You*
Presented by CFA Institute
The Forum, Hall 3F, Level 3

**13:45–14:30**
*SPONSORED CORPORATE PRESENTATIONS WITH DESSERT*

*A Definitive Guide to China's Economic Cycle: How to Trade China*
BOCOM International
Hao Hong, CFA
Convention Hall B, Level 1

*FactSet's Trip Advisor: Exploring the Multi-Asset Class Universe*
FactSet
Pat Reilly, CFA
Convention Hall A, Level 1

*The "Total China" Approach*
FTSE Russell
Alex Chen, CFA
Christopher Vass
Theater 2, Level 1
Significant Economic Impacts and Investment Implications of Demographic Shifts
Macquarie Investment Management
Matthew Mulcahy
Convention Hall C, Level 1

14:05–14:25
MiFID II: A New Era for Investment Research?
Presented by CFA Institute
The Forum, Hall 3F, Level 3

15:00–15:45
CONCURRENT PRACTITIONER SESSIONS

Behavioral Factors and Their Performance in Emerging Markets: An Illustration Using China A-Shares Data
Jason Hsu
Convention Hall B, Level 1

The Investment Firm of the Future
Richard Brandweiner, CFA
Virginie Maisonneuve, CFA
Roger Urwin, FSIP, Moderator
Theater 1, Level 1

Risks and Opportunities in Asian Frontier Markets Investing
Joyce Ng
Andreas Vogelsanger
Gerard Lee, CFA, Moderator
Theater 2, Level 1

Asia’s Fixed-Income Market—The Elephant in the Room
Emil Nguy
Convention Hall A, Level 1

15:45–16:15
Refreshment Break with Exhibitors

CFA Institute ARX: Premier Hub for Asia-Pacific Investment Research
Presented by CFA Institute
The Forum, Hall 3F, Level 3

16:15–17:15
CAREER TRACK

Trends and Opportunities in Asian Asset Management
Sehr Ahmed
Nicolas Manset
Larry Cao, CFA, Moderator
Convention Hall B, Level 1

It’s Who Knows You: The Importance of Networking in Helping You Build a Successful Career
Andy Lopata
Theater 1, Level 1

Career Approaches for Millennials and Gen-Xers: How to Succeed in Your Career as a Younger Worker
Lauren Friese
Convention Hall A, Level 1

Propel Your Career: Figuring Out Your Next Move
Eric Sim, CFA
Theater 2, Level 1

17:15–18:00
Meet and Greet: Career Track Speakers
Convention Hall Foyer, Level 1

#Annual2018
TUESDAY, 15 MAY 2018

08:00–08:45
SPONSORED CORPORATE PRESENTATIONS WITH BREAKFAST

A Global Perspective on Institutional Investor Behavior
EVESTMENT
John Molesphini
Convention Hall B, Level 1

Talkin’ 'bout My Correlation
T. Rowe Price
Joran Laird, CFA
Nick Slater
Convention Hall A, Level 1

09:00-12:45
PLENARY SESSIONS

09:00–09:15
Morning Announcements
Hall 3G, Level 3

09:00–09:15
Abenomics: Japan’s Macro and Markets Outlook
Kathy M. Matsui
Hall 3G, Level 3

09:15–10:15
Refreshment Break with Exhibitors

10:15–10:45
The CFA Institute Members App: Updates and Looking to the Future
Presented by CFA Institute
The Forum, Hall 3F, Level 3

10:45–11:45
Developments in Financial Technology: A Conversation with Cutting Edge Leaders
Bidyut Dumra
Ting Li, CFA
Xiaodong Tang, CFA
James Benoit, CFA, Moderator
Hall 3G, Level 3

11:45–12:45
Alternative Investment Opportunities in Asia: A Conversation with Institutional Allocators and Managers
Amy Flikerski
Chris Gradel
Carl Huttenlocher
Mario A. Therrien, CFA
Bruce Tomlinson, CFA, Moderator
Hall 3G, Level 3

12:45–13:15
NETWORKING LUNCH
Exhibit Hall, Hall 3F, Level 3
Sponsored by Style Research

13:15-13:45
CFA® Institute Programs: Raising the Standards of Professional Excellence
Presented by CFA Institute
The Forum, Hall 3F, Level 3

13:45-14:30
SPONSORED CORPORATE PRESENTATION WITH DESSERT
Hong Kong Exchanges and Clearing Limited (HKEX)
Convention Hall B, Level 1

14:00–14:30
Continuing Professional Development: Raising the Bar
Presented by CFA Institute
The Forum, Hall 3F, Level 3

15:00–15:45
CONCURRENT PRACTITIONER SESSIONS

Meeting Client Objectives through Goals-Based Investment Strategies
Stefano Cavaglia
Theater 1, Level 1

Hanging on Every Word: Natural Language Processing Unlocks New Frontier in Corporate Earnings Sentiment Analysis
David Pope, CFA
Convention Hall A, Level 1
Why ESG is a Mega-Trend No Investor Can Ignore (Even in Asia)
Emily Chew
Theater 2, Level 1

Private Equity and Venture Capital: A Transformation Agent with Importance for Both Investors and Businesses in Asia
Claudia Zeisberger
Convention Hall C, Level 1

15:45–16:15
Refreshment Break with Exhibitors

16:15–17:45
EXTENDED SESSIONS

Lessons in Identifying and Countering the Participation, Compensation, and Advancement Gaps Faced by Women in Finance around the World
Anne Cabot-Alletzhauser
Xiaowei Rose Luo
Rani Piputri, CFA
Deborah M. Kolb, Moderator
Convention Hall C, Level 1

The Art of Cultural Fluency in Business and Leadership
Jane Hyun
Theater 2, Level 1

The Future of Global Investing: Asset Owners Panel
Christopher J. Ailman
Hiro Mizuno
Alison Tarditi
Roger Urwin, FSIP, Moderator
Theater 1, Level 1

Incorporating Geopolitical Analysis into Your Investment Process
Jim Mylonas
Convention Hall B, Level 1

18:00–21:30
Networking Reception and Dinner
Grand Hall, Level 3

Sponsored by
Macquarie Investment Management

Join us for dinner and networking on Tuesday evening in the Grand Hall at the Hong Kong Convention and Exhibition Centre. Meet other delegates and enjoy local culture, history, and cuisine.
Wednesday, 16 May 2018

08:00–09:00
Breakfast with Exhibitors

08:30–09:00
Charter Benefits: Access Exclusive Educational Resources and Advance Your Career
Meet and Greet with CFA Institute Credentialing Team
The Forum, Hall 3F, Level 3

09:00–12:45
Plenary Sessions

09:00–09:15
Morning Announcements
Hall 3G, Level 3

09:15–10:15
Crypto-Assets: Redefining a New Asset Class
Sandra Ro
Hall 3G, Level 3

10:15–10:45
Refreshment Break with Exhibitors
Meet and Greet: Sandra Ro
Exhibit Hall, Hall 3F, Level 3

10:45–11:45
Short Takes: New Perspectives on the Future of Global Investing
Altaaf Aboo, CFA
Brindha Gunasingham, CFA
Malcolm White, CFA
Hall 3G, Level 3

11:45–12:45
Thinking, Fast and Slow
Daniel Kahneman
Hall 3G, Level 3

12:45
Conference Close
EXHIBIT HALL (3F), LEVEL 3

EXHIBITOR KEY

- Abu Dhabi Global Market: 39
- Axioma: 3
- BCA Research: 33
- Bloomberg: 23
- BOCOM International: 26
- CAIA Association: 35
- Cboe Global Markets: 2
- CME Group: 11
- CMT Association: 30
- EVESTMENT: 25
- FactSet: 15
- FTSE Russell: 29
- Global Financial Data: 1
- Haver Analytics: 21
- Hong Kong Exchanges and Clearing Limited (HKEX): 36
- II Journals: 22
- Kaplan Schweser: 43
- Labuan IBFC: 37
- Macquarie Investment Management: 7
- MSCI Hong Kong Limited: 46
- Nuveen: 45
- Principles for Responsible Investment Academy (PRI Academy): 38
- S&P Dow Jones Indices: 31
- S&P Global Market Intelligence: 32
- Stradegi Consulting: 13
- The Center for Research in Security Prices (CRSP): 18
- Thomson Reuters: 17
- T. Rowe Price: 28
- Wiley: 19

Kiosk Exhibitors
- Art Futures Group Co. Ltd.: H
- First Rate, Inc.: B
- HKUST-NYU Stern MS in Global Finance Program: E
- HSBC Business School of Peking University: G
- ProShares: D
- Tsinghua University: C
- Wharton Research Data Services (WRDS): A

CFA Institute at the Forum
- Membership and Community: J
- Professional Development: K
- Advocacy and Research: L
- Ethics, Standards, and Professional Conduct: M

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CFA Institute Forum
The Forum is the place to go to connect with fellow delegates, hear firsthand about current CFA Institute initiatives, share your thoughts with staff, and learn about the benefits of membership. The Forum will be busy throughout the conference with online demos, special-interest presentations, and small-group networking.

CFA Institute Career Center
Learn about the many career resources CFA Institute offers and meet with career and executive coaches. Coaches are available to quickly review your CV and discuss your career management and development questions.

Headshots
Professional headshots are offered as a complimentary benefit to conference delegates. Come by to have your photo taken for use in your social media accounts.

Conference Live
Conference Live brings the Annual Conference experience online with live broadcasts of select sessions, exclusive speaker interviews, and discussions of current topics. Swing by the Conference Live Studio to get a sneak peek.

Recharge Lounge
Take a break to power up your mobile devices and your mind with access to complimentary charging, specialty coffee and tea, and comfortable lounge seating. Also catch Conference Live content streaming in this space!

Speaker Meet and Greets
Select speakers will be hosting meet and greet opportunities in the exhibit hall following their sessions. Join these informal conversations to ask questions and engage directly with conference speakers.

Golf Simulator
Come by to practice your swing and play a few holes between sessions. Sponsored by Visible Alpha
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