



CFA Institute

71ST

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



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Conference Live

Visit annual.cfainstitute.org/live to watch conference sessions and access exclusive speaker interviews and discussions of current topics.



Conference Website
annual.cfainstitute.org



Twitter

Follow [#Annual2018](https://twitter.com/Annual2018) for live updates from the Annual Conference.



HONG KONG TOURISM BOARD

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.



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.

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

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

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

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



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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**

**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

18:30–19:30

Welcome Reception

Exhibit Hall, Hall 3F, Level 3

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BOCOM International, and FactSet

Bloomberg



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



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

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

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

**13:00-13:30
Professional Conduct: Protecting Our Shared Values**
Meet and Greet with CFA Institute
Professional Conduct Team
The Forum, Hall 3F, Level 3

**13:10-13:30
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

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**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 Friesse
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



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

09:15–10:15

Abenomics: Japan's Macro and Markets Outlook

Kathy M. Matsui

Hall 3G, Level 3

10:15–10:45

Refreshment Break with Exhibitors

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

12:45–14:30

NETWORKING LUNCH

Exhibit Hall, Hall 3F, Level 3

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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

Illusion of Control and Its Impact on Judgments

Anil Gaba

Convention Hall B, Level 1

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



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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-Alletzhäuser
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.



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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



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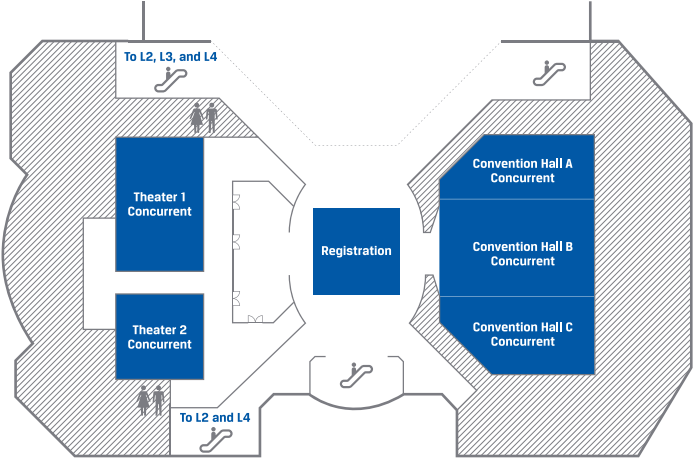
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See you next year...
12-15 May 2019
London, United Kingdom

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LEVEL 1



LEVEL 3

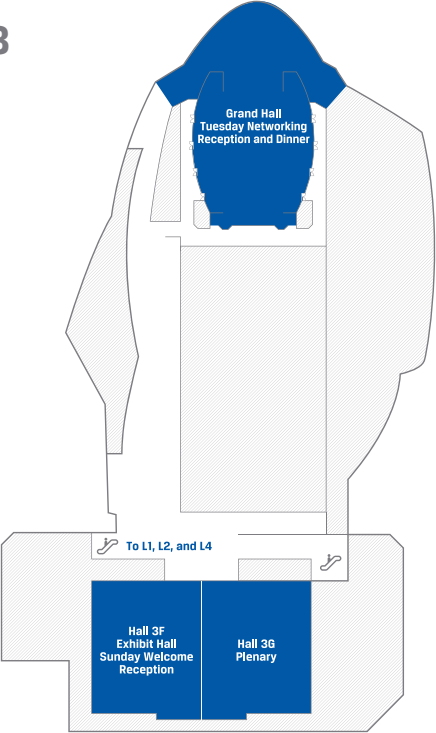
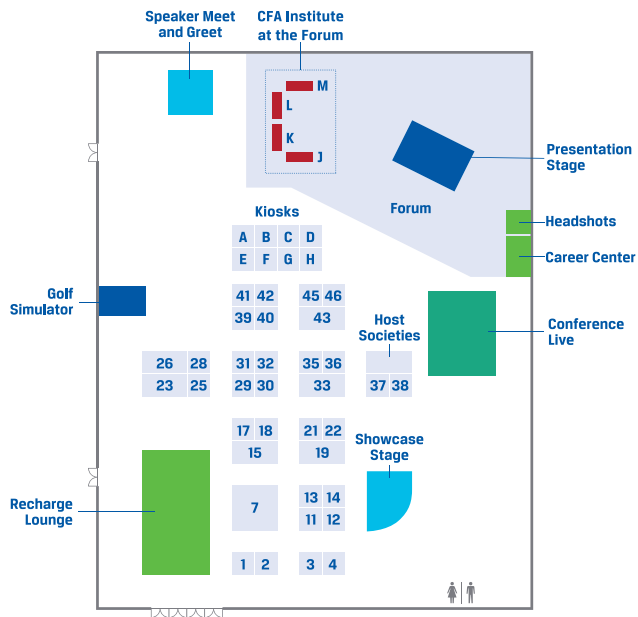


EXHIBIT HALL (3F), LEVEL 3



EXHIBITOR KEY

Abu Dhabi Global Market	39	S&P Dow Jones Indices	31
Axioma	3	S&P Global Market Intelligence	32
BCA Research	33	Stradegi Consulting	13
Bloomberg	23	The Center for Research in Security Prices (CRSP)	18
BOCOM International	26	Thomson Reuters	17
CAIA Association	35	T. Rowe Price	28
Choe Global Markets	2	Wiley	19
CME Group	11	Kiosk Exhibitors	
CMT Association	30	Art Futures Group Co. Ltd.	H
EVESTMENT	25	First Rate, Inc.	B
FactSet	15	HKUST-NYU Stern MS in Global Finance Program	E
FTSE Russell	29	HSBC Business School of Peking University	G
Global Financial Data	1	ProShares	D
Haver Analytics	21	Tsinghua University	C
Hong Kong Exchanges and Clearing Limited (HKEX)	36	Wharton Research Data Services (WRDS)	A
II Journals	22	CFA Institute at the Forum	
Kaplan Schweser	43	Membership and Community	J
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Macquarie Investment Management	7	Advocacy and Research	L
MSCI Hong Kong Limited	46	Ethics, Standards, and Professional Conduct	M
Nuveen	45		
Principles for Responsible Investment Academy (PRI Academy)	38		

EXPLORE THE EXHIBIT HALL

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.

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