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## 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 Website**  
[annual.cfainstitute.org](http://annual.cfainstitute.org)



## Twitter

Follow [#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.



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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.

### 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

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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



CFA Institute

# 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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**Bloomberg**

 交銀國際  
BOCOM International

**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

12:45-14:30

### 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 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



# TUESDAY, 15 MAY 2018

08:00-08:45

## SPONSORED CORPORATE PRESENTATIONS WITH BREAKFAST

A Global Perspective on Institutional Investor Behavior

INVESTMENT

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

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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

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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-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



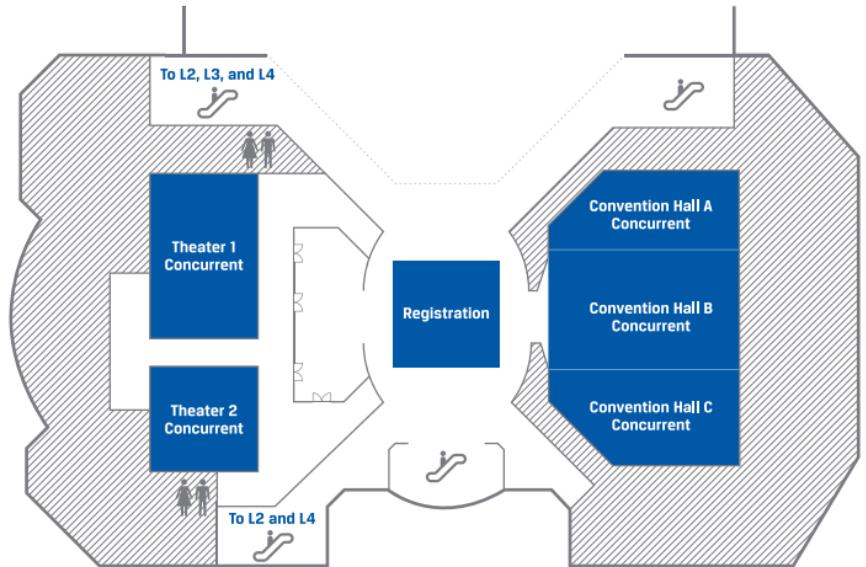
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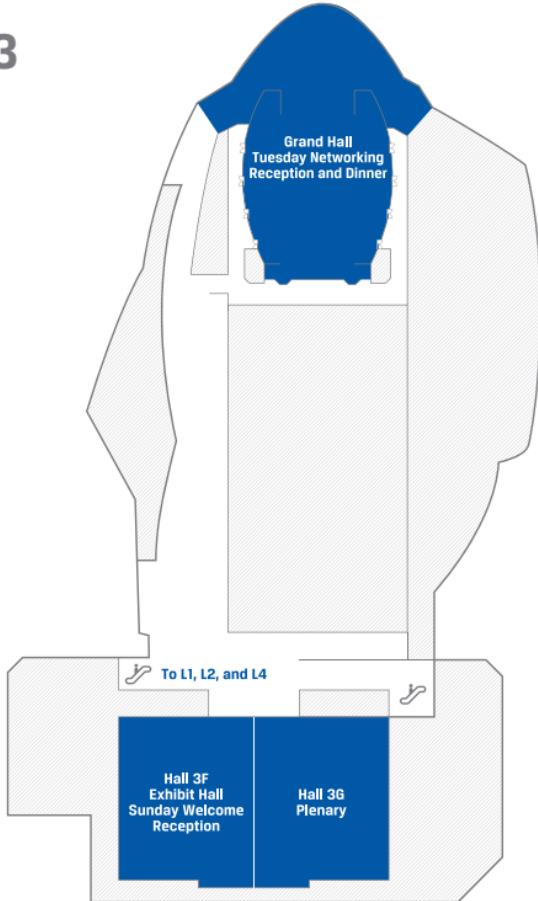
See you next year...  
**12-15 May 2019**  
**London, United Kingdom**

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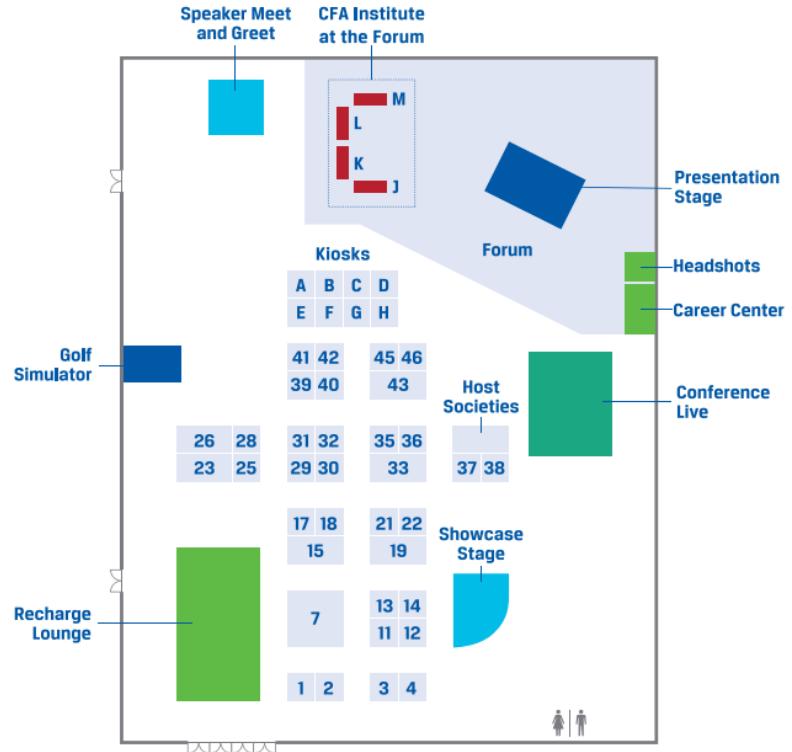
## LEVEL 1



## 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
Cboe Global Markets	2	Wiley	19
CME Group	11	<b>Kiosk Exhibitors</b>	
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	<b>CFA Institute at the Forum</b>	
Kaplan Schweser	43	Membership and Community	J
Labuan IBFC	37	Professional Development	K
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		

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# 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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