

27th February 2020, The St. Regis, Mumbai

'Industry Progression amidst Economic Restructuring'

PROGAMME

1400 – 1500 hrs Registration

1500 – 1605 hrs

Inaugural Session

Over the years, CII has seen the industry mature and grow and it has provided a strong platform to the industry stakeholders like the regulator, the fund houses and distributors to come together and debate over current industry issues and address the challenges. We are witnessing evolution in our economy which is also impacting the AMC sector. We gather today to have a discussion and brainstorm on the AMC sector way forward in a time of rapid changes, driven by shifting investor preferences, margin compression, regulatory developments and advance technologies.

The theme for this year's Summit is '**Industry progression amidst economic restructuring**' which captures Key changes and necessary measures the industry has to undertake continues progress of the sector and growth of the Investors in this economic restructuring times.

Opening Remarks

Dr Janmejaya Sinha

Chairman, CII National Committee on Financial Inclusion and Digitisation
& Chairman - Asia Pacific
The Boston Consulting Group India Private Limited

Chairman's Remarks and Setting the context

Sundeep Sikka

Chairman-CII Mutual Fund Summit and Executive Director and Chief Executive Officer
Nippon India Mutual Fund

Address

NS Venkatesh

Chief Executive Officer
Association of Mutual Funds in India (AMFI)

Special Address

G Mahalingam

Whole-Time Member,
Securities and Exchange Board of India (SEBI)

Concluding Remarks

Sundeep Sikka

1605 – 1630 hrs

Tea / Coffee Break

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1630 – 1730

CEO Panel Discussion 1

Indian Credit Crisis – Reality check or Learning Curve for Indian Asset Management Industry?

In light of the recent Credit Crisis in India, what are the areas in Indian Asset Management Industry that show scope for improvement? Discussion areas where processes could be changed or strengthened to face the changing economic environment.

Session Moderator **Mayank Jha**
Partner, Managing Director
Boston Consulting Group

Panellists **Ashwani Bhatia**
Managing Director and Chief Executive Officer
SBI Mutual Fund

Vishal Kapoor
Chief Executive Officer
IDFC Asset Management

Vijay Chandok
Managing Director and Chief Executive Officer
ICICI Securities Ltd

Lakshmi Iyer
CIO-Fixed Income & Head-Products
Kotak Mahindra Asset Management

Somasekhar Vemuri
Senior Director, Ratings Centre of Excellence
CRISIL Ratings

1720 – 1730 hrs

Q&A and Concluding Remarks

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1730 – 1830 hrs

CEO Panel Discussion 2

Demystifying the unique requirements of the Indian MF investor and the related responsibility of each stakeholder to serve the end customer

Indian MF investors come from various backgrounds and consequently have a wide gamut of needs from AMCs and distributors. This topic seeks to explore the key unmet needs of the investors and any major underlying obstacle that could slow down MF adoption in India.

Session Moderator **Vivek Prasad**
Partner
Price Waterhouse

Panellists **Dhruv Mehta**
Chairman
Foundation of Independent Financial Advisors (FIFA)

Neeraj Choksi
Founder and Joint Managing Director
NJ India Invest

Ravi Menon
Chief Executive Officer
HSBC Asset Management Ltd.

Anuj Kumar
President and Chief Executive Officer
Computer Age Management Services Pvt. Ltd

Anthony Heredia
Chief Executive Officer
Baroda Asset Management India Limited

1820 - 1830 hrs

Q&A and Concluding Remarks

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1830 – 1930 hrs

CEO Panel Discussion 3

Role of Mutual Funds in channeling Household Savings into Capital Markets for robust long-term wealth creation of investors and economy

MFs have proved to be a robust mechanism to create a virtuous cycle by channeling household savings into the capital markets and thus contributing to its robust growth. What are the key roles of MFs to help investors across various geographies including tier III and IV locations of India and especially income levels, to participate the Indian Growth Story?

Session Moderator **Suparna Biswas**
Partner
McKinsey & Company

Panellists **Sharad Mohan**
Country Head - Retail Banking
Citibank India

Ajit Menon
Chief Executive Officer
PGIM India Asset Management Private Limited

Swarup Mohanty
Chief Executive Officer
Mirae Asset Global Investments Pvt Ltd

Kailash Kulkarni
Chief Executive Officer
L&T Mutual Fund

Anand Dalmia
Co-Founder and Chief Business Officer
Fisdom

1920 - 1930 hrs

Q&A and Concluding Remarks

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1930 – 1945 hrs	Special Address	M Damodaran Chairperson Excellence Enablers Private Limited & Former Chairman Securities and Exchange Board of India (SEBI), Unit Trust of India (UTI), Industrial Development Bank of India (IDBI)
1945 – 1950 hrs		Summit Concluding Remarks
1950 hrs		Cocktail & Dinner

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