Amundi
ASSET MANAGEMENT
東方匯理 資產管理

Amundi Asia Investment Day, Tokyo, 20th – 21st July 2017
TOWARDS A WORLD OF GAME CHANGERS

DAY 1, 20th July 2017, Thursday
Hotel Gajoen Tokyo

08:30 – 09:00	Registration & Welcome Coffee
09:00 – 09:10	Opening speech **Christian Pellis, Global Head of Distribution, Amundi**
09:10 – 09:20	Welcome remarks **Julien Fontaine, President, Amundi Japan**
09:20 – 09:50	The challenges and opportunities in the US **Kenneth J. Taubes, Chief Investment Officer, U.S. Investment Management, Amundi Pioneer**
09:50 – 10:50	**MEET THE INSIDERS:** Is ageing population a burden or an opportunity for the economy? In Japan, family businesses are sold to large corporates due to lack of successors; and there are increasing demand in medical and elderly care services. Let's hear what the insiders say. – A sharing from a Japanese M&A advisor/business broker and a Japanese IT solutions provider **Moderator:** **Taisuke Fujita, Head of Active Japan Department, Amundi Japan** **Panelists:** **Norihiro Takehara, President and CEO, Infocom Corporation** **Yasuhiro Wakebayashi, Chairman and Founder, Nihon M&A Center Inc.**
10:50 – 11:10	Coffee Break
11:10 – 11:50	**MEET THE THOUGHT LEADER 1:** Disruptive in the world **Yoshio Matsushita, Partner, Innovation Leader, Consumer Product and Retail Sector Leader in Asia Pacific Region and Japan, Deloitte Japan**
11:50 – 12:30	How to invest in the ageing and disruptive megatrends? **Vafa Ahmadi, Head of Thematic Equities Management, CPR Asset Management** **Wesley Lebeau, Thematic Equities Portfolio Manager, CPR Asset Management**
12:30 – 14:00	Lunch

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14:00 – 14:30	The game changing policies of Japan - Abenomics **Keynote speaker:** Tatsuo Yamasaki, Former Vice Minister of Finance for International Affairs, Ministry of Finance, Japan
14:30 – 15:30	**PANEL DISCUSSION** Towards a World of Game Changers – Trump, Brexit, Protectionism, Populism…, where are the opportunities? **Moderator:** Yasunori Iwanaga, Chief Investment Officer, Amundi Japan **Panelists:** Kenneth J. Taubes, Chief Investment Officer, U.S. Investment Management, Amundi Pioneer Mo Ji, Chief Economist, Asia ex-Japan, Amundi Hong Kong Alexandre Drabowicz, Deputy Head of Equities, Amundi Marie-Anne Allier, Deputy Global Head of Fixed Income, Amundi
15:30 – 15:50	Coffee Break
15:50 – 16:25	The game changing reform and innovations in India Sidharth Mahapatra, Director, Investment, Amundi Hong Kong
16:25 – 17:00	Amundi digital tools for distributors and asset managers Bertrand Pujol, Deputy Head of Retail Marketing, Amundi Marie-Pascale Bonhomme, Director, Amundi Retail Partnerships Asia, Amundi Singapore
18:00 – 18:30	Sake Tasting
18:30 – 21:00	Dinner A glance at the future technology and lifestyle **Guest Speaker:** Shaun Cochran, Global Head of Thematic Research, CLSA
21:00 –	Networking Cocktail

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DAY 2, 21st July 2017, Friday
Workshops: Amundi Japan Office
After Workshops: Hibiya Palace

08:45 - 09:00	Morning Coffee	
	WORKSHOP A	**WORKSHOP B**
09:00 – 09:30	**[A1] First Eagle** The 150-year-old investment wisdom meets the changing world *By **Hiroaki Sato**, First Eagle Investment Specialist, Amundi Japan*	**[B1] Capital protection strategies** Customizing derivative-free capital protected/guaranteed solutions – uncover the black box *By **Isabelle de Malherbe**, Head of Product Specialists, Structured Solutions, Amundi*
09:30 – 10:00	**[A2] US equity** S&P 500 continuously reaches historical highs, how should investors position their US exposures going forward? *By **Andrew Acheson**, SVP, Portfolio Manager & Leader of the U.S. Growth Team, Amundi Pioneer*	**[B2] Japanese equity** Some researches said Japan could be the trade of the decade, why and how – the turnaround story of Japanese equity *By **Yasunori Iwanaga**, Chief Investment Officer & **Taisuke Fujita**, Head of Active Japan Department, Amundi Japan*
10:00 – 10:30	**[A3] US fixed income** While conventional wisdom says rising interest rate environment is not favourable to bond market, do investors have the full picture? *By **Kenneth J. Taubes**, Chief Investment Officer, U.S. Investment Management, Amundi Pioneer*	**[B3] European equity** Amid Brexit and all changes across Europe, should investors turn a blind eye to European equity or is it something investors should not omit? *By **Alexandre Drabowicz**, Deputy Head of Equities, Amundi*
10:30 – 11:00	Company tour in Amundi Japan Office	
	(Depart for Hibiya Palace, the lunch venue)	
11:30 – 12:00	Fund distribution landscape and challenges in Asia **Mark Wei, Chairman, KGI Bank**	
12:00 – 12:40	**MEET THE THOUGHT LEADER 2:** Fintech: How financial institutions in Asia prepare for the future? **Vito Giudici, Senior Partner, McKinsey Japan**	
12:40 – 14:00	Lunch & Close of the Conference	
14:00 – 17:30	Sightseeing **Edo Tokyo Museum → The Sumida Hokusai Museum → Edo NOREN**	

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