

## Global Financial Leaders' Investment Summit

### Sailing through Changes

#### **18 November (5:45pm – 9:00 pm) – Welcome Dinner**

Venue: The Henderson, 2 Murray Road, Central, Hong Kong

5:45 pm      Cocktail reception

7:00 pm      Dinner

#### **19 November (8:30 am – 2:30 pm) – The Summit**

Venue: Grand Hyatt Grand Ballroom, Grand Hyatt Hong Kong, 1 Harbour Road, Wan Chai, Hong Kong

7:30 am      Registration

8:30 am      Welcome remarks by **Eddie Yue**, JP, Chief Executive of the Hong Kong Monetary Authority

Keynote by The Hon **CHAN Kwok-ki**, GBS, IDSM, JP, Acting Chief Executive of the Hong Kong SAR

8:50 am      **Opening Keynote by HE Lifeng**, Vice Premier, The State Council of the People's Republic of China

9:20 am      **Mainland financial developments**

Speakers

- **LI Yunze**, Minister, National Financial Regulatory Administration
- **WU Qing**, Chairman, China Securities Regulatory Commission
- **ZHU Hexin**, Deputy Governor, People's Bank of China and Administrator, State Administration of Foreign Exchange

Moderator

- **Eddie Yue**, JP, Chief Executive, Hong Kong Monetary Authority

9:45 am      **Navigating a complex world**

The global economy is navigating a complex and volatile landscape, marked by ongoing conflicts, the global elections cycle, the climate crisis, trade fragmentation, the rise of populism, and so on. These developments have far-reaching implications for policy decisions, cross-border trade and investment, and financial markets. How should market participants sail through these uncharted waters?

Panellists (*in alphabetical order of surnames*)

- **Jane Fraser**, CEO, Citi
- **Colm Kelleher**, Chairman, UBS Group AG
- **Jean Lemierre**, Chairman, BNP Paribas

- **Kanetsugu Mike**, Chairman, MUFG

Moderator

- **Arthur Yuen**, JP, Deputy Chief Executive, Hong Kong Monetary Authority

10:25 am

### **Markets, trends and opportunities**

With diverging paths for growth, inflation and monetary policy around the world, where are the most compelling market opportunities? Are the key themes and market trends we've seen likely to persist? What risks should investors most watch out for?

Panellists *(in alphabetical order of surnames)*

- **Jonathan Gray**, President and COO, Blackstone
- **Ronald P. O'Hanley**, Chairman and CEO, State Street Corporation
- **Ted Pick**, CEO, Morgan Stanley
- **Marc Rowan**, CEO, Apollo Global Management
- **David Solomon**, Chairman and CEO, Goldman Sachs

Moderator

- **Howard Lee**, JP, Deputy Chief Executive, Hong Kong Monetary Authority

11:05 am

Break

11:20 am

### **The future of finance – artificial intelligence and digitalisation**

The rise of artificial intelligence and digitalisation is transforming the financial services industry, bringing new opportunities and risks. How are the new technologies being applied and how should the industry harness their potential responsibly? What are the prospects of emerging crypto assets and tokenisation becoming a significant part of traditional finance?

Panellists *(in alphabetical order of surnames)*

- **Mike Gitlin**, President and CEO, Capital Group
- **Jenny Johnson**, President and CEO, Franklin Templeton
- **Daniel Pinto**, President and COO, JPMorganChase
- **Peng Zhao**, CEO, Citadel Securities

Moderator

- **Julia Leung**, SBS, JP, CEO, Securities and Futures Commission

12:00 pm

### **Investing in Asia: outlook and opportunities**

Home to more than half of the world's population, Asia is expected to contribute 60% of global growth this year. What are the key trends, growth drivers, and investment opportunities in the region? How do panellists assess the case for investing in Asia amid domestic challenges and geopolitical risks?

Panellists *(in alphabetical order of surnames)*

- **Georges Elhedery**, Group Chief Executive, HSBC Holdings plc
- **GE Haijiao**, Chairman, Bank of China
- **Professor HUANG Yiping**, Dean, National School of Development, Peking University
- **Bill Winters**, Group Chief Executive, Standard Chartered

Moderator

- **Bonnie Y Chan**, CEO, Hong Kong Exchanges and Clearing Limited

12:35 pm

### **Trends shaping private markets**

With macroeconomic headwinds, higher financing costs and an uncertain global backdrop, are we entering a slower era in private markets? Panellists will share their views on trends, opportunities and challenges in private market investing, the rotation into private credit, and considerations around private equity listings.

Panellists *(in alphabetical order of surnames)*

- **Joe Bae**, Co-CEO, KKR
- **Jim Coulter**, TPG Co-Founder & Executive Chairman, and a TPG Rise Climate Managing Partner
- **Rob Lucas**, CEO, CVC
- **Howard Marks**, Co-Chairman, Oaktree Capital Management
- **Harvey Schwartz**, CEO, Carlyle

Moderator

- **Neil Shen**, Founding and Managing Partner, HongShan

1:15 pm

Lunch

Keynote by The Hon **Paul Chan**, GBM, GBS, MH, JP, Financial Secretary of the Hong Kong SAR

### **Fireside chat**

This fireside chat will explore the key themes shaping the transformation of Hong Kong and the wider region. Panellists will discuss the reconfiguration of global supply chains, advancements in technology and innovation, and enhanced capital markets connectivity, as well as the opportunities that lie ahead.

Panellists *(in alphabetical order of surnames)*

- **Dr Victor K. Fung**, GBM, GBS, Chairman, Fung Investments
- **Joseph Tsai**, Chairman, Alibaba Group

Moderator

- **Laura M Cha**, GBM, GBS, JP, Senior Advisor to the Board, Hong Kong Exchanges and Clearing Limited

2:25 pm

Closing by **Eddie Yue**, JP, Chief Executive, Hong Kong Monetary Authority

## **20 November (8:30 am – 12:30 pm) – Conversations with Global Investors**

Co-organised by the Hong Kong Monetary Authority, Securities and Futures Commission, and Hong Kong Academy of Finance

Venue: HKEX Connect Hall, 1/F, One and Two Exchange Square, Central, Hong Kong

7:30 am Registration

8:30 am Welcome remarks by **Julia Leung**, SBS, JP, CEO, Securities and Futures Commission

8:35 am Keynote by The Hon **Paul Chan**, GBM, GBS, MH, JP, Financial Secretary of the Hong Kong SAR and Honorary President of Hong Kong Academy of Finance

8:45 am **Investment Outlook and Long-term Asset Allocation Strategies**  
Panellists will discuss the macro backdrop and investment outlook, and how long-term investors should position themselves when the world is undergoing key structural changes e.g. deglobalisation, emerging technologies, decarbonisation, demographic changes. Panellists will also share their views on which geographic regions / asset classes / sectors offer the best opportunities.

Panellists (*in alphabetical order of surnames*)

- **Yie-Hsin Hung**, President and CEO, State Street Global Advisors
- **Laurent Ramsey**, Managing Partner, Pictet
- **Andrew Schlossberg**, President and CEO, Invesco

Moderator

- **Christina Choi**, Executive Director, Investment Products, Securities and Futures Commission

9:35 am **Alternative Assets and Strategies in the Current Complex Environment**  
Panellists will share their insights on the role of alternative assets in a diversified portfolio; current risks and opportunities in private equity, private credit, real assets and infrastructure.

Panellists (*in alphabetical order of surnames*)

- **Juan Delgado-Moreira**, Co-CEO, Hamilton Lane
- **Goodwin Gaw**, Chairman and Managing Principal and Co-Founder, Gaw Capital Partners
- **Deborah K. Orida**, President and CEO, Public Sector Pension Investment Board
- **Jeffrey Perlman**, CEO, Warburg Pincus

Moderator

- **Harshika Patel**, CEO, Asia Private Bank, J.P. Morgan

- 10:20 am **Private Equity in Asia**  
 Panellists will discuss the current state of the private equity market in Asia. The conversation will touch on a wide range of sector-specific themes and market dynamics, and zoom in on the key business trends in Asia.
- Panellists (*in alphabetical order of surnames*)
- **Nisa Leung**, Managing Partner, Qiming Venture Partners
  - **Jean Eric Salata**, Chairman of EQT Asia, EQT Group
  - **ZHANG Lei**, Founder & Chairman, Hillhouse
- Moderator
- **Samson Wong**, Chief Investment Officer, Private Markets, Exchange Fund Investment Office, Hong Kong Monetary Authority
- 10:55 am Break
- 11:10 am **Conversation among Risk Takers**  
 At last year’s Summit, speakers shared how they navigated volatile markets and where they saw risks and opportunities. What has changed since then and how are they positioning themselves?
- Panellists (*in alphabetical order of surnames*)
- **Chris Gradel**, Co-founder & CEO, PAG
  - **Bob Prince**, Co-CIO, Bridgewater Associates
  - **Michael J. Sacks**, Chairman and CEO, GCM Grosvenor
- Moderator
- **Albert Goh**, Chief Investment Officer, External Managers, Exchange Fund Investment Office, Hong Kong Monetary Authority
- 11:45 am **Opportunities and Risks of the New Technology Era**  
 What is the impact of technological transformation e.g. big data, machine learning, blockchain technology and Generative AI on the investment industry and on investors? How to drive AI development with both innovation and responsibility in mind?
- Panellists (*in alphabetical order of surnames*)
- **Ken Hao**, Chairman and Managing Partner, Silver Lake
  - **Deven J. Parekh**, Managing Director, Insight Partners
  - **David Siegel**, Co-Chairman and Co-Founder, Two Sigma
  - **Hemant Taneja**, CEO & Managing Director, General Catalyst
- Moderator
- **CHEUNG Leong**, Chief Strategy Officer, Exchange Fund Investment Office, Hong Kong Monetary Authority
- 12:30 pm Closing by **Eddie Yue**, JP, Chief Executive of the Hong Kong Monetary Authority and Chairman of Hong Kong Academy of Finance
- Note:** Names, synopses and compositions of panels may be subject to further adjustments.