

## Global Financial Leaders' Investment Summit

### Living with Complexity

6-8 November 2023

#### 6 November (5:45pm-9:00pm) – Welcome Dinner

Venue: Hong Kong Palace Museum, West Kowloon Cultural District, 8 Museum Drive

5:45 pm           Cocktail reception and private gallery viewing

7:00 pm           Dinner

#### 7 November (8:30am-2:30pm) – The Summit

Venue: Four Seasons Grand Ballroom, Four Seasons Hotel Hong Kong, 8 Finance Street, Central, Hong Kong

7:30 am           Registration

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

8:35 am           Opening keynote by **HE Lifeng**, Vice-premier, The State Council of the People's Republic of China (*pre-recorded*)

8:45 am           Keynote by The Hon **John KC LEE**, GBM, SBS, PDSM, PMSM, Chief Executive of Hong Kong SAR

8:55 am           **China - the way forward**

##### Panellists

- **ZHANG Qingsong**, Deputy Governor, People's Bank of China
- **XIAO Yuanqi**, Vice Minister, National Financial Regulatory Administration
- **WANG Jianjun**, Vice Chairman, China Securities Regulatory Commission

##### Moderator

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

9:25 am

**Next crisis in finance - what crisis?**

In today's world, with still uncertain inflation path, weakening global growth momentum, and tightening financial conditions, what are the key risks to financial stability and what can we do to mitigate them?

Panellists *(in alphabetical order of surnames)*

- **James Gorman**, Chairman and CEO, Morgan Stanley
- **Colm Kelleher**, Chairman, UBS Group
- **Bob Prince**, Co-CIO, Bridgewater Associates
- **Christian Sewing**, CEO, Deutsche Bank

Moderator

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

10:00 am

**Markets, trends and opportunities**

While the rate hike cycle may be nearing its end, it seems that we are not seeing a return to the ultra-low rate era in the 2010s either. What opportunities and challenges does it pose to the financial community? Monetary policy aside, what new opportunities do investors see?

Panellists *(in alphabetical order of surnames)*

- **Peter Harrison**, Group Chief Executive, Schroders
- **Marc Rowan**, CEO, Apollo Global Management
- **David Solomon**, Chairman and CEO, Goldman Sachs
- **C.S. Venkatakishnan**, Group Chief Executive, Barclays

Moderator

- **Jin Su**, Asia Pacific President, Bank of America

10:35 am

**Perspectives from both sides of the capital markets**

The world has experienced plenty of disruptions in recent years – technology, the pandemic, geopolitics, to name a few. In this session, we will discuss how investors are reacting to and taking advantages of these disruptions, and how this may affect their investment and operational approaches and processes.

Panellists *(in alphabetical order of surnames)*

- **Jon Gray**, President and COO, Blackstone
- **Ken Griffin**, Founder and CEO, Citadel

Moderator

- **David Rubenstein**, Co-Founder and Co-Chairman of the Board, Carlyle

11:10 am

Break

11:25 am

**ESG investments - at a crossroad**

What is the future direction of ESG investments? How can we scale up adaptation and transition financing? What are the roles that financial institutions, multilateral development banks and the public sector should play to support orderly transition?

Panellists *(in alphabetical order of surnames)*

- **Valerie Baudson**, CEO, Amundi
- **Mark Carney**, Chair of Brookfield Asset Management and Head of Transition Investing; United Nations Special Envoy on Climate Action and Finance
- **Bill Winters**, Group Chief Executive, Standard Chartered

Moderator

- **Paul Yang**, CEO, Asia Pacific, BNP Paribas

12:00 pm

**Mainland China/Greater Bay Area/Hong Kong: New dimensions**

Panellists will share their views on opportunities in Mainland China, Greater Bay Area and Hong Kong going forward.

Panellists *(in alphabetical order of surnames)*

- **GE Haijiao**, Chairman, Bank of China
- **Noel Quinn**, Group Chief Executive, HSBC
- **Neil Shen**, Founding and Managing Partner, Sequoia China (HongShan)

Moderator

- **Helen Wong**, JP, Group CEO, OCBC

12:35 pm

**Tech and finance - tailwinds and headwinds**

At last year's Summit, speakers discussed how innovations had the potential to upend the status quo and redefine the financial market landscape, value propositions, business processes, and risk management. How much has changed since? Jurisdictions are developing / introducing different regulatory regimes and approaches for new technologies and crypto / virtual assets – what are the implications? Meanwhile, could innovations like generative AI be a potential game changer?

Panellists *(in alphabetical order of surnames)*

- **Henry Fernandez**, Chairman and CEO, MSCI
- **Jane Fraser**, CEO, Citi
- **Jenny Johnson**, President and CEO, Franklin Templeton

Moderator

- **Nicolas Aguzin**, CEO, Hong Kong Exchanges and Clearing Limited

1:10 pm

Lunch

Special **fireside chat** in celebration of the 30<sup>th</sup> anniversary of the Hong Kong Monetary Authority

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

2:28 pm

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

## **8 November (8:30am-12:45pm) – Conversations with Global Investors**

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

Venue: Four Seasons Grand Ballroom, Four Seasons Hotel Hong Kong, 8 Finance Street, Central, Hong Kong

7:30 am           **Registration**

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

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

8:45 am           **Macro Landscape**

Global growth seems to have stabilised, but inflation, higher for longer interest rates, geopolitical conflicts, and a reversal of globalisation still cloud the horizon. Panellists would explore the interplay of these forces and discuss what lie ahead of us.

Panellists (*in alphabetical order of surnames*)

- **Mike Gitlin**, CEO, Capital Group
- **Anne Richards**, CEO, Fidelity International
- **Andrew Schlossberg**, President and Chief Executive Officer, Invesco
- **Mark Wiedman**, Head of the Global Client Business, BlackRock

Moderator

- **Julia Leung**, SBS, JP, Chief Executive Officer, Securities and Futures Commission

9:30 am           **Asset Allocation in a Challenging Environment**

With rising interest rates and risks, where should we put our money across different asset classes and sectors? Which geographical regions offer the best returns? How are the world's aging population and geopolitical developments etc. going to shape the world of investment?

Panellists (*in alphabetical order of surnames*)

- **Howard Marks**, Co-Chairman, Oaktree
- **Ming Mei**, Co-Founder & CEO, GLP
- **Michael J. Sacks**, Chairman and Chief Executive Officer, GCM Grosvenor
- **George H. Walker**, Chairman and Chief Executive Officer, Neuberger Berman

Moderator

- **Harshika Patel**, Chief Executive Officer, Asia Private Bank; Chief Executive Officer, Hong Kong; J.P. Morgan Chase Bank, N.A.

10:15 am         **The Future of Investing**

Looking beyond the near term, what key forces are shaping investment in the long run? How are ESG objectives and technological innovations and

disruptions such as AI going to change the industry? What is the outlook for private equity?

Panellists *(in alphabetical order of surnames)*

- **Juan Delgado-Moreira**, Vice Chairman, Hamilton Lane
- **Nate Sleeper**, CEO, CD&R
- **Hemant Taneja**, CEO & Managing Director, General Catalyst

Moderator

- **Janet Perumal**, Senior Managing Director, Director of Investments, Asia, Head of Hong Kong and Greater China, Wellington Management

11:00 am

Break

11:15 am

**Conversation among Risk Takers**

Top risk takers would share how they navigate volatile markets; where they see risks and opportunities; and the role of alternatives in a portfolio.

Panellists *(in alphabetical order of surnames)*

- **Chris Gradel**, CEO and Co-Founder, PAG
- **Sir Paul Marshall**, CIO and Chairman, Marshall Wace
- **Peng Zhao**, CEO, Citadel Securities

Moderator

- **Albert Goh**, CIO of External Managers, Hong Kong Monetary Authority

12:00 pm

**Asia / Mainland China Markets**

Seasoned investors in this Panel will share what they see on the ground in Asia and Mainland China's private markets. How have private equity investment strategies changed in the past year? How do GP drive value creation in volatile markets? What are the main challenges affecting deal making and where do the biggest opportunities lie? What is "Mainland China and other Asian emerging market risk" and how to manage it?

Panellists *(in alphabetical order of surnames)*

- **Chip Kaye**, CEO, Warburg Pincus
- **Lei Zhang**, Founder and Chairman, Hillhouse
- **Yichen Zhang**, Chairman & CEO, Trustar Capital

Moderator

- **Ganen Sarvananthan**, Managing Partner, Head of Asia and the Middle East, TPG

12:45 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.