

CFA Society  
India

# **11TH** INDIA INVESTMENT CONFERENCE

29th, 30th & 31st January, 2021

**#IndiaInvConf**

## **CONFRONTING DISRUPTION**

*Virtual Conference*

Hosted by CFA Society India.

**SPONSORSHIP OPPORTUNITIES**



# EVENT OVERVIEW

11TH INDIA  
INVESTMENT  
CONFERENCE



Technological innovation and changing demographics are among the many forces that have taken disruption to unsurpassed levels. In addition, there is growing awareness that it is not just profits - it is responsible profits that matter. Unexpected events can make investing even more difficult. The India Investment Conference offers a unique forum to network, learn and deliberate on these and many other challenges and opportunities we face. Come attend, network with experts, and learn!

## About CFA Institute

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organisation is a champion of ethical behaviour in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow.

## About CFA Society India\*

CFA Society India (Indian Association of Investment Professionals), established in April 2005, is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisers, and other financial professionals. As one of the over 150 CFA Institute member societies, CFA Society India connects local members to a global network of investment professionals. The key objectives of CFA Society India are to promote ethical and professional standards within the investment industry in India and to facilitate the exchange of information and opinions among people within the local investment community and beyond. CFA Society India also works to further the public's understanding of the CFA® designation and the investment industry.

*\*CFA Society India is a registered trademark of CFA Institute licensed to be used by the Indian Association of Investment Professionals.*

## Top Employers of CFA® Charterholders Globally:

Bank of America Merrill Lynch · BlackRock · BMO Financial Group · Credit Suisse · HSBC · JPMorgan Chase · Royal Bank of Canada · TD Bank Financial Group · UBS · Wells Fargo

## Top Employers of CFA® Charterholders in India:

Ambit Group · Citigroup · CRISIL · Deutsche Bank · Goldman Sachs · HSBC · ICICI Group · JP Morgan Chase · MSCI · State Bank of India

## CONTACTS

To secure any of these opportunities and gain access to investment management professionals attending the India Investment Conference, please contact:

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CFA Society India  
annlin@india.cfasociety.org

**ANIL GHELANI, CFA**  
Vice Chairman, CFA Society India  
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# DISTINGUISHED SPEAKERS

FROM PAST CONFERENCES

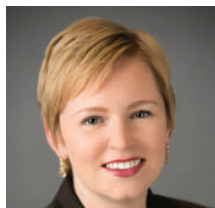
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**Peter Berezin**  
Chief Strategist,  
BCA Research



**Rupal Bhansali**  
Chief Investment Officer,  
International and Global  
Equities Portfolio Manager,  
Ariel Investments



**Heather Brilliant, CFA**  
CEO & President,  
Diamond Hill Capital  
Management



**Robert P. Browne, CFA**  
Executive VP and Chief  
Investment Officer,  
Northern Trust



**Ashvin B. Chhabra**  
President,  
Euclidean Capital



**Aswath Damodaran**  
Professor of Finance  
Leonard N. Stern School of  
Business,  
New York University



**Sir Howard Davies**  
Chairman  
Royal Bank of Scotland



**Mihir Desai**  
Mizuho Financial Group  
Professor of Finance,  
Harvard Business School;  
Professor of Law, Harvard  
Law School



**Anil Gaba**  
Professor of Decision  
Sciences and the Orpar  
Chaired Professor of Risk  
Management, INSEAD



**Carla Harris**  
Vice Chairman, Managing  
Director, Senior Client Advisor,  
Morgan Stanley



**Morgan Housel**  
Partner,  
Collaborative Fund



**Richard Koo**  
Chief Economist,  
Nomura Research Institute



**Dr. Vikram Kuriyan, CFA**  
Director, Investment Lab  
Indian School of Business



**Joel Litman**  
President and CEO  
Valens Research & Chief Inv.  
Strategist of Altimetry



**Philippa Malmgren**  
President and founder,  
DRPM Group  
Co-Founder, H Robotics



**Russell Napier, ASIP**  
Independent Strategist  
and Co-Founder,  
Electronic Research  
Interchange (ERIC)



**Arvind Panagariya**  
Professor of Economics  
Jagdish Bhagwati Professor  
of Indian Political Economy,  
Columbia University



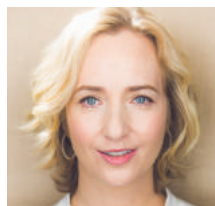
**Manoj Pradhan**  
Founder,  
Talking Heads Macro



**Nouriel Roubini**  
Professor of Economics  
NYU's Stern School of Business  
CEO, Roubini Macro Associates,  
LLC



**Ratna Sahay**  
Deputy Director,  
Monetary and Capital  
Markets Department (MCM),  
International Monetary Fund



**Allison Schrage**  
Economist and Journalist  
Quartz



**Sunil Singhanía, CFA**  
Founder, Abakkus Asset  
Manager LLP



**Jonathan B. Stein, CFA**  
Chief Executive Officer and  
Founder, Betterment



**Roger Urwin**  
Global Head of Investment  
Content,  
Willis Towers Watson



**Andy Xie**  
Independent Economist



Investment professionals attend the India Investment Conference to network with peers; attend educational sessions led by respected industry experts; and learn about new resources, products, and services that are available to assist their performance in their profession.

Our conference delegates are chief investment officers, research analysts, portfolio managers, corporate financial analysts, strategists, investment banking analysts, brokers, traders, risk managers, consultants, and financial advisers who have worked in the investment industry (mostly equities) for more than 10 years. Firms represented include wealth managers, financial advisers, family offices, trust companies, and others involved in the management of private wealth.

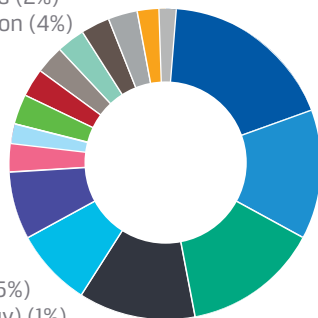
## The demographic profile reflects data from the 2020 India Investment Conference (in-person event)

# 570+

### Delegate Attendance

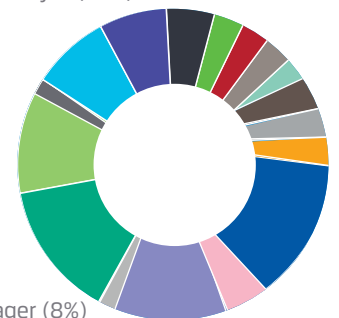
#### Employer Type

- Asset Management/Inv. Firm (29%)
- Business or Knowledge Process (2%)
- University/Educational Institution (4%)
- IT or Software (1%)
- Accounting Firm (2%)
- Manufacturing (2%)
- Brokerage (6%)
- Commercial Bank (7%)
- Consulting Firm (8%)
- Insurance (3%)
- Investment Bank (7%)
- Government or Regulator (1%)
- Private Wealth Mngmnt Firm (15%)
- Utilities (e.g., Oil and Gas, Energy) (1%)
- Credit Rating Agency/Firm/Bureau (1%)
- All Others (12%)



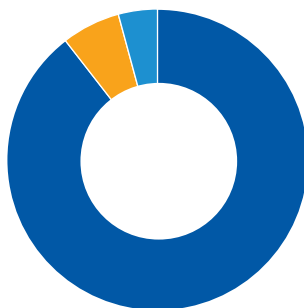
#### Delegate Occupation

- Performance Analyst (1%)
- Relationship Manager/Account Manager (2%)
- Accountant or Auditor (2%)
- Research, Investment, or Quantitative Analyst (22%)
- Portfolio Manager (13%)
- Manager of Managers (3%)
- Chief Executive Officer (6%)
- Risk Analyst/Manager (3%)
- Consultant (7%)
- Corporate Financial Analyst (3%)
- Chief Investment Officer (3%)
- Professor/Academic (3%)
- Investment Consultant (2%)
- Credit Analyst (3%)
- Investment Strategist (4%)
- Financial Adviser/Planner/Wealth Manager (8%)
- Sales Agent (Securities, Commodities, Financial Services) (1%)
- Trader (2%)
- All Others (11%)



#### Region

- America (2.7%)
- Asia Pacific (95.8%)
- EMEA (1.5%)



#### Membership Status



# SPONSORSHIP PROGRAM

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## GOLD SPONSOR

₹3 lakhs\* | 2 Available

20 Complimentary Passes (For Delegates and Staff)

Gold sponsor can enjoy great exposure, generate strong sales leads, and raise the firm's profile in the investment community through this opportunity by showcasing your products and services through video commercial to industry decision makers.

Gold sponsor can enjoy brand recognition on the sponsor section of event page, promotional emails, and social media promotion prior to the event, as well as verbal mentioning by the conference chairman and logo exposure during the event. Gold sponsor could also send an email message to the opt-in delegates after the event.

## SILVER SPONSOR

₹2 lakhs\* | 4 Available

10 Complimentary Passes (For Delegates and Staff)

Silver sponsor can enjoy brand recognition on the sponsor section of event page, promotional emails, and social media promotion prior to the event, as well as verbal mentioning and logo exposure during the event. Silver sponsor could also send an email message to the opt-in delegates after the event.

\*Exclusive of GST

SPONSORSHIP AND EXHIBIT OPPORTUNITIES	Gold Sponsor	Silver Sponsor
<b>Quantity Available</b>	2	4
<b>Price (in INR, exclusive of GST)</b>	₹3 lakhs	₹2 lakhs
<b>Deliverables</b>		
<b>Sponsored Corporate Presentation / Video Commercial</b>		
Video Commercial - A one-minute sponsor's video to be played during break between sessions	•	
Digital recognition on the sponsor section of event page, promotional emails, & social media promotion	•	•
Verbal mentioning of sponsor by conference chairman at the beginning of each conference day	•	•
Logo exposure on the presentation deck at the beginning and the end of the conference	•	•
Sponsors collateral on the resource page of the virtual platform	•	•
Logo Exposure on the presentation deck at the beginning and the end of the added benefit workshop for delegates	•	•
<b>Delegate Passes</b>		
Complimentary delegate passes to the virtual conference for staff and delegates	20	10
<b>Email List</b>		
One-time use of the post-event opt-in email list	•	•

# DELEGATE FEE

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Delegate Registration (Inclusive of taxes)	Early Bird*	Regular Fee
Members of CFA Society India	Free	Free
Member of CFA Society other than India	Free	Free
Passed Level III of the CFA Program	INR 960	INR 1200
CFA® Program Registered Candidates	INR 960	INR 1200
Non-Members	INR 1200	INR 1500

\*Prices cover all 3 days of the conference.

\*Early bird offer ends on 10 January 2021.

## Deadlines for Enrollment and Submission

Enrollment in sponsorship package	<b>12 January 2021</b>
Submission of company logo and description	<b>15 January 2021</b>
Delegate details for complimentary delegate pass and working pass	<b>20 January 2021</b>