

7TH

# INDIA WEALTH MANAGEMENT CONFERENCE

Beyond Goldilocks, Is This An Opportunity To Shine?

#INWealth

## AGENDA

TUESDAY, 9TH AUGUST 2022

● CONFERENCE CHAIR

**KISHOR BAGRI, CFA**

Director, Professional Learning Committee, CFA Society India

8.30 AM - 9.00 AM ● REGISTRATION

9.00 AM - 9.20 AM ● CONFERENCE OPENING & REMARKS

**ABHISHEK LOONKER, CFA**

Director, CFA Society India

**MARG FRANKLIN, CFA**

President and CEO, CFA Institute

9.20 AM - 10.20 AM ● KEYNOTE ADDRESS

**NAVNEET MUNOT, CFA**

MD & CEO,  
HDFC Asset Management Company Limited,  
Director, CFA Society India

**AASHISH P. SOMAIYAA (MODERATOR)**

Chief Executive Officer,  
WhiteOak Capital Mutual Fund

10.20 AM - 10.40 AM NETWORKING BREAK & TEA BREAK

10.40 AM - 11.40 AM ● THE CHANGING LANDSCAPE OF WEALTH MANAGEMENT INDUSTRY

**KARAN BHAGAT**

Founder, Managing Director  
and Chief Executive Officer,  
IIFL Wealth & Asset Management

11.40 AM - 12.40 PM ● THE RETURNS CONUNDRUM: IS YOUR STRATEGY, RIGHT?

**LARRY SWEDROE**

Chief Research Officer,  
Buckingham Wealth Partners

**RAJEEV THAKKAR, CFA (MODERATOR)**

Chief Investment Officer & Director,  
PPFAS Asset Management Private Limited

12.40 PM - 2.00 PM NETWORKING + EXTENDED LUNCH

2.00 PM - 3.00 PM ●

3.00 PM - 3.30 PM NETWORKING BREAK + TEA BREAK

3.30 PM - 4.30 PM ● AMERICA'S LEAD ON MEGA-SIZED COMPANIES: IS A PEAK NIGH?

**RITIKA MANKAR, CFA**

Strategist (Global Investment Strategy),  
BCA Research

4.30 PM - 5.00 PM ● CLOSING REMARKS

**SHAMIT CHOKSHI, CFA**

Chairperson, Professional Learning Committee, CFA Society India