

9th India Wealth Management Conference

FRIDAY, 2nd AUGUST 2024 | THE ST. REGIS, MUMBAI | #INWEALTH



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AGENDA | FRIDAY, 2nd AUGUST 2024

8:30 AM - 9:00 AM ● REGISTRATIONS

9:00 AM - 9:05 AM ● CONFERENCE CHAIR



KUNAL SABNIS, CFA
Portfolio Manager,
Nine Rivers Capital



AANCHAL ALMAL, CFA
Investment Sales specialist
Family Offices Institutions,
DSP Asset Managers Pvt.Ltd.

9:05 AM - 9:10 AM ● CONFERENCE OPENING & REMARKS (SOCIETY)



SHAMIT CHOKSHI, CFA
Director, CFA Society India
Principal: Offshore Fund
Investments, International
Business, ICICI Prudential AMC Ltd.

9:10 AM - 9:15 AM ● CONFERENCE OPENING & REMARKS (CFA INSTITUTE)



ARATI PORWAL
Country Head of India,
CFA Institute

9:15 AM - 10:15 AM ● GLOBAL WEALTH:
Money in Motion



DANIEL FARLEY
Chief Investment Officer,
Investment Solutions Group,
Executive Vice President,
State Street Global Advisors



SHAMIT CHOKSHI, CFA (Moderator)
Director, CFA Society India
Principal: Offshore Fund
Investments, International
Business, ICICI Prudential AMC Ltd.

10:15 AM - 11:10 AM ● WEALTH MANAGEMENT:
The Road Ahead



UMANG PAPNEJA
Managing Director & CEO,
Julius Baer India



GAURAV KAUSHIK, CFA (Moderator)
Executive Director,
Aventus Wealth

11:10 AM - 11:40 AM ● NETWORKING + TEA BREAK

11:40 AM - 1:10 PM ● THE STORY OF UC
INVESTMENTS: Mastering
Long-Term Success
Through Strategic Asset
Allocation, Active
Management and Strong
Organizational Culture



SATISH ANANTHASWAMY, CFA
Senior Managing Director,
UC Investments
Head of Asia, Co-head of Real Estate,
& Co-head of Asset Allocation



RAJESH SEHGAL, CFA (Moderator)
Chairperson, CFA Society India
Managing Partner, Equanimity Investments

1:10 PM - 2:10 PM ● NETWORKING + EXTENDED LUNCH

2:10 PM - 2:55 PM ● SPECIALIST SESSION 1 & 2

BEHAVIOURAL INVESTING



NIMESH CHANDAN
Chief Investment Officer,
Bajaj Finserv Asset Management



KISHOR BAGRI, CFA (Moderator)
Wealth Manager, Avior Finserv



WEALTH MANAGEMENT TALENT LANDSCAPE

NAVIN UPADHYAYA
Chief Human Resources Officer, 360 ONE



LITESH GADA, CFA (Moderator)
Director, CFA Society India
Founder, Aureus Assets

3:00 PM - 3:40 PM ● HOW TO BUILD AND
MANAGE WEALTH OVER
GENERATIONS



HEMENDRA M. KOTHARI
Non-Executive Chairman,
DSP Asset Managers



ASHISH GUMASHTA (Moderator)
Former Executive Chairman
& CEO of Julius Baer, India

3:40 PM - 4:00 PM ● NETWORKING + TEA BREAK

4:00 PM - 4:45 PM ● SUCCESSION PLANNING:
The Why, The How and
The What



BIJAL AJINKYA
Partner at Khaitan & Co.



GAJENDRA KOTHARI, CFA (Moderator)
Managing Director & Chief Executive Officer,
Etica Wealth (P) Ltd.

4:45 PM - 5:30 PM ● AI IN WEALTH
MANAGEMENT



VIKRAM SRINIVASAN
CEO and Co-founder
of Needl.ai



SHREENIVAS KUNTE, CFA, PH.D. (Moderator)
Senior Lead, Automation and
Content, HDFC Asset Management
Company Ltd.

5:30 PM - 5:45 PM ● TOP QUOTES OF THE DAY



NAVIN VOHRA, CFA
Vice-chairperson, CFA Society India
National Leader - Valuations Modelling
and Economics, Ernst & Young