



**18-20 April 2005**  
**Shangri-La's Rasa Sentosa Resort**  
**Singapore**

**Summit Chairman:**

**Visit Tantisunthorn, Secretary General, Government Pension Fund Thailand**

**Keynote Speaker: Regional Pension Update**

**Robert Palacios Senior Pension Economist, South Asia Region, The World Bank**

### **Understanding socioeconomic trends & their impact on investment in Asia**

**Latest Pension and Economic trends across Asia**

- Be responsive to market trends to increase your ROI
- Determine volatility and maturation levels of regional financial markets
- Enhance investor education levels, savings capabilities & culture to increase your portfolio options
- Analyse various regional Institutional and public sector reform frameworks for investment opportunity improvements

**J Desmond Sheehy Senior Investment Officer, International Finance Corporation**

### **Managing the business of Pensions: Strategy, Diversification and Governance**

**Harnessing funds as a catalyst for Corporate Governance**

- Managing high performing sustainable pension funds
- Transparency and reporting
- Communicating value to the analyst and shareholder communities
- Protecting reputation risk with stakeholder communications

**Datuk Azlan Zainol, CEO, Employees Provident Fund, Malaysia**

### **Responsible Investment, Sustainability and Fiduciary Responsibilities**

**Integrating Socially Responsible Investment into your portfolio**

- Comparison of returns among SRI and regular funds
- Portfolio screening, shareholder engagement and community investing
- Communicating the benefits of SRI to gain stakeholder commitment

**Tessa Tennant, Executive Chair, Association for Sustainable and Responsible Investment in Asia**

**Managing pension funds as if the long-term really did matter**

- Active ownership and management
- Using your status as the top of the supply chain wisely
- Aligning responsible investment goals with your organisations pension policy mandate

**Raj Thamoeram, Senior Responsible Investment Advisor, Universities Superannuation Scheme UK**

**Strengthening pension and investment stability with Responsible Investment Principles and Reporting Standards**

- Introducing the UNEP Responsible Investment Initiative
- Sustainability reporting guidelines for Asian institutional investors
- Pinpointing the crucial fiduciary and materiality issues surrounding responsible investment in the region
- Stabilising emerging markets through long-term responsible pension investment and shareholder engagement

**James Gifford, Project Manager, United Nations Environment Program Finance Initiative**

### **Regional Benchmarking: International Case Studies on investment and pension policy reform**

**Investment in Japan for both public and corporate pension schemes:**

- Investment Policy
- Management Structure
- Asset Allocation
- Performance Measurement

**Noboru Terada, Chief Investment Officer, Government Pension Investment Fund, Japan**

**Latest Developments in China's pension reform:**

- Demographic impact of ageing trends for the world's most populous nation
- Outlining China's old pension system, compared with the new Three Pillars System
- Pension Investment: Government benefits and supplementary benefits for the Private Sector
- Investment options in China

**Stuart Leckie, Vice Chairman, Hong Kong Retirement Schemes Association**

**Joint Presentation: Reform and Function - Implementing India's new DC pension system**

- Outlining the policy and regulatory road-map of India's pension reform
- Insights into process design, institutional architecture and business issues for pension fund managers and service providers in the region
- IIEF and Finance Ministry's business projections for India's new DC pension system
- Findings from the recent ADB survey on 43000 Indian households

**Gautam Bhardwaj, Director, Invest India Economic Foundation**

**Investment Management: Risk, Responsibilities and Relationships**
**Choosing and Maintaining relationships with the best Investment Managers**

- Transition Management
- Evaluating and benchmarking ROI
- Attaining performance and managing costs

**Paulus Lee, Executive Director Finance, Hong Kong Jockey Club 'Institutional Investor of the Year 2004'**

**Balancing risk return either with yield enhancement or trend strategies**

- Strategic asset allocation : investment objectives, risk/return profile and performance drivers
- Yield enhancement strategies : low volatility
- Trend strategies : directional
- First and second generation usage of hedge funds in portfolio management

**Hans-Jörg Baumann, CEO & Chairman, Swiss Capital AG**

**Investment Strategies, Asset Allocation and Portfolio Construction**
**Rethinking the value of Alternative Investments**

Five years into the Alternative Investment wave it is time to regenerate your investment portfolio strategy to gain value from alternative products

- Choosing the most suitable products and asset mix
- Balancing risk and rewards within Alternative Investment options, with a focus on managing currency risk
- Has the hedging boom ended or will Asia's emerging markets deliver the anticipated hedge fund returns?
- Managing transparency, risk control and regulatory issues for alternatives

**Carlos Higuchi, Managing Director, INVESCO Asset Management (Japan)**

**Diversifying into foreign markets to increase returns**

A recent Asian Investor Magazine survey found that only 8% of Asian institutional investors' assets are invested internationally. Due to increasing pressure to enhance returns, this figure is set to grow.

- Capitalising on international markets
- Overcoming market protectionism, the hangover of the Asian currency crisis
- Benefiting from rigorous competition among funds in a global economy

**Timothy Matson, Regional Head of Fixed Income, ING Investment Management APAC**

**Improve your Investment Management Strategy through the power of science**

- Comparison of empirically based asset management vs. traditional asset management
- Advantages of empirically based asset management
- Development and possibilities of empirically based asset management
- Case studies as benchmarking tools

**Dr Markus Steinmann, CEO, MPerical**

**Enhancing Fixed Income Returns in the Current Interest Rate Environment**

- Will rising interest rates mean a bear market for bond investors?
- Are passive fixed income strategies proving disappointing?
- How to dodge the bear market: Being selective about timing and type of active management

- With a little help from our friends: Some specific alpha generating  
**Joseph Taylor Vice President and Emerging Market Bonds Strategist**

**Multi-Asset Portfolio: An Absolute Return Approach**

- The role of hedge funds in a portfolio setting
- Key considerations when blending hedge funds with traditional asset classes
- Utilising both alternative strategies and traditional investments to achieve absolute return

**James Leung, Portfolio Management Director, GAM Hong Kong**