

PHILIPPINE INVESTMENT CONFERENCE 2023

THE WAY FORWARD:

Working Towards an Inclusive,
Resilient, Sustainable World.

25 January 2023 - 6:30PM | 26-27 January 2023 - 1:00PM
Raffles Makati

FEATURED SPEAKERS AND PANELISTS



Mr. Dan Fineman

Co-Head of Asia-Pacific Equities Strategy
and Head of Research for Thailand Equities
Credit Suisse Securities (Philippines) Inc.



Mr. Ismael Jerusalem

Founder and CEO
Ownly



Dr. Eduardo Banzon

Principal Health Specialist
Southeast Asia Department
Asian Development Bank



Mr. Philippe Dauba - Pantanacce

Executive Director, Senior
Economist,
Global Geopolitical Strategist
Standard Chartered



Ms. Catherine Anne Casas

Senior Vice President
Head of Blockchain and
API Business Group
Union Bank of the Philippines

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#PIC2023 #WayForward



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Corporate Table



Organization Partners



OVERVIEW

Covid-19 pandemic. Russia-Ukraine war. NFTs. Metaverse. Climate change. The new decade has ushered in a world that is largely unfamiliar to everyone.

Businesses, investors and regulators have to reframe their thinking about almost everything – from their goals and the way they work to how they interact with clients and with one another. There is no turning back to what was; there is also no more room for delays in shaping a more equitable and resilient world. Today, adaptation and sustainability are the norm lest one gets left behind.

In this changing landscape, CFA Society Philippines will host the Philippine Investment Conference 2023 with the theme, "The Way Forward: Working Towards an Inclusive, Resilient and Sustainable World". This year's three-day hybrid forum brings forth meaningful discussions about the status of the markets, impact of global events and shifts to current paradigms that shaped the recent past and will continue to influence the future. Delegates get the chance to hear from and interact with the industry's top minds, business leaders, institutional investors and many others.

CFA Society Philippines presents the Philippine Investment Conference on 25 - 27 January 2023.

It is time to traverse the way forward.

REGISTRATION FEES

REGULAR RATE (Until January 16, 2023 only)

- CFAP Member : Php8,999.00
- Non-Member : Php11,999.00

(Rates are VAT Inclusive)



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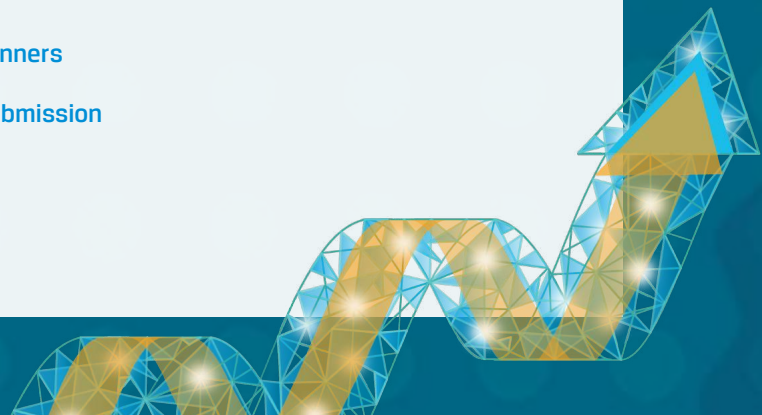
CONFERENCE AGENDA

25 JANUARY 2023 | 6:30PM

DAY 1 (LIVE VIRTUAL) | WEDNESDAY

The Annual Forecast Event: Where are Markets Headed?

This yearly event brings together CFA charterholders and other members of the local finance and investment community, including industry professionals, regulators, academe, and media. In this prestigious gathering, industry experts discuss the current economic environment and the outlook for the coming year.

6:30PM **Prayer and Philippine National Anthem****6:40PM** **Welcome Remarks****Mr. Don Hernandez, CFA**Board Trustee & VP for Academic Relations
CFA Society Philippines**6:50PM** **Economic and Market Outlook****Panelist****Dr. Luis Dumlao**Dean, John Gokongwei School of Management
Ateneo de Manila University**Panelist****Mr. Dan Fineman**Co-Head of Asia-Pacific Equities Strategy and Head of Research
for Thailand Equities
Credit Suisse Securities (Philippines) Inc.**Panelist****Ms. Hazel Tanedo**Head of Research
Credit Suisse Securities (Philippines) Inc.**Panelist****Ms. Jeanette Yutan**Head of Research
J.P. Morgan Securities Philippines**Moderator****Ms. April Tan, CFA**Chief Equity Strategist
COL Financial Group, Inc.**7:50PM** **Q&A****8:10PM** **2022 Annual Forecast Game Winners****8:15PM** **2023 Annual Forecast Game Submission****8:20PM** **Closing and Announcements**

CONFERENCE AGENDA

26 JANUARY 2023 | 1:00PM

DAY 2 (LIVE VIRTUAL) | THURSDAY

1:00PM Prayer and Philippine National Anthem

1:10PM Welcome Remarks

**Atty. Julio P.G. Bucoy, CFA**Board Trustee & VP for Industry Relations
CFA Society Philippines

1:20PM Keynote Speech

**Mr. Eduardo Marino**Deputy Treasurer
Bureau of Treasury

2:10PM When Health is Wealth: The Vulnerability of Economies to Health Emergencies

**Speaker****Dr. Eduardo Banzon**Principal Health Specialist
Southeast Asia Department
Asian Development Bank**Moderator****Ms. Cristina Gabaldon, CFA**Head of Equities
Sunlife

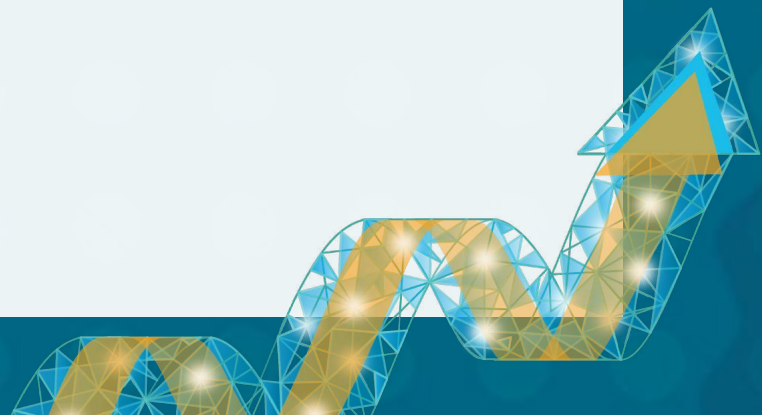
Q&A

3:00PM Break

3:15PM The Alternatives: Developments in the Non-Traditional Investments Space

**Panelist****Ms. Catherine Casas**Senior Vice President and Head of Blockchain
and API Business Group
UnionBank of the Philippines**Panelist****Ms. Carol Mills**President and CEO
AREIT, Inc.**Panelist****Mr. Kenneth Stern**General Manager
Binance

Q&A



CONFERENCE AGENDA

 26 JANUARY 2023 | 1:00PM

DAY 2 (LIVE VIRTUAL) | THURSDAY

4:05PM

Geopolitics Today: How Uncertain is the Future?



Speaker

Mr. Philippe Dauba - PantanacceExecutive Director, Senior Economist,
Global Geopolitical Strategist
Standard Chartered

5:00PM

Q&A

Closing and Announcements

THE WAY FORWARD:
Working Towards an Inclusive,
Resilient, Sustainable World.

CONFERENCE AGENDA

27

JANUARY 2023 | 1:00 P.M.

DAY 3 (LIVE FACE-TO-FACE) | FRIDAY

1:00PM Prayer and Philippine National Anthem

1:10PM Welcome Remarks

**Dr. Robert Ramos, CAIA, CIPM, CFA**President and Chairman of the Board
CFA Society Philippines

1:20PM Keynote Speech

**Atty. Kelvin Lee**Commissioner
Securities and Exchange Commission

2:10PM The Future of Life: What Happens When Everything Goes Virtual

**Speaker**
Mr. Ismael Jerusalem
Founder and CEO
Ownly**Moderator**
Mr. Denley Mirabueno, CFA, FRM
Senior Vice President
Citibank Philippines

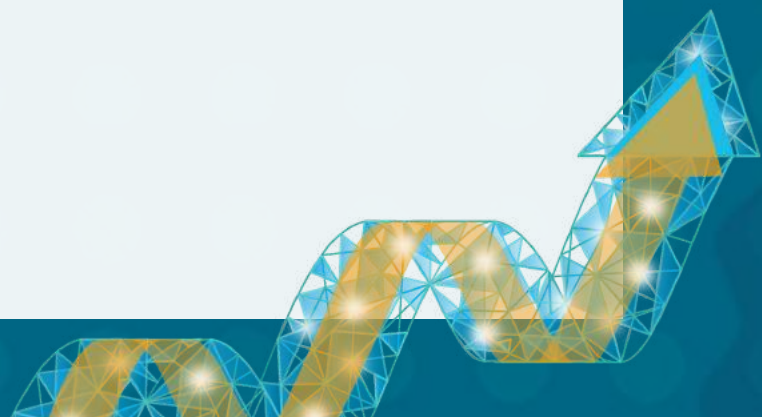
Q&A

3:00PM Break

3:15PM Trends in Sustainable Investing: Advancements and Challenges

**Speaker**
Mr. David von Eiff, PhD
Director, Institutional Partnerships APAC
CFA Institute**Moderator**
Mr. Jerome Go, CIPM
Head of Independent
Wealth Consultants Channel
ATRAM Group

Q&A



CONFERENCE AGENDA

27

JANUARY 2023 | 1:00 P.M.

DAY 3 (LIVE FACE-TO-FACE) | FRIDAY

4:05PM

Insights from the C-Suite



Panelist

Mr. Grant Cheng, CFACFO and Executive Director
Cebu Landmasters Inc.

Panelist

Mr. Michael EnriquezPresident and Chief Investment Officer
Sun Life Investment Management and Trust Corporation

Panelist

Mr. Eduardo FranciscoPresident
BDO Capital & Investment

Moderator

Mr. Edmund Lee, CFAPresident and CEO
Caylum Trading Institute

Q&A

5:00PM

Closing and Announcements

