

## Location: The Campus, Lower Lobby Floor, Grand Hyatt Erawan

### 8 March 2023 (Wednesday)

Time	Lecture Hall	Classroom 1	Classroom 2	Classroom 3
8:30	<b>Global equity strategy</b>			
9:20	Alex Redman, CLSA			
9:30	<b>Connecting Asean businesses with China's growing capital</b>			
10:20	Wilfred Yiu, Co-Chief Operating Officer and Head of Equities, HKEx			
10:30	<b>Regional connections, Asean to China</b>	<b>Indonesia strategy</b>	<b>Grab</b>	<b>Mind AI<sup>P</sup></b>
11:20	Robert Yap, Executive Chairman YCH	Sarina Lesmina, CLSA	Jolyn Chew, IR (SG technology)	Paul Lee, Founder and CEO (PH AI tech)
11:30	<b>Vietnam: Back on course</b>	<b>Malaysia strategy</b>	<b>Cemindo</b>	<b>NEON<sup>P</sup></b>
12:20	Bill Stoops, Chairman, Investment Committee Dragon Capital	Sue Lin Lim, CLSA	Ameesh Anand, CFO (IN cement)	Ron Tan, Executive Chairman and CEO (SG digital entertainment)
12:30	<b>What's in store for emerging market investors in 2023?</b>			
13:50	Mark Mobius, Founding Partner, Mobius Capital Partners			
14:00	Closed	<b>ETF tracking in Vietnam</b>	<b>Keppel Infrastructure</b>	<b>Innergia Labs<sup>P</sup></b>
14:50		Thanh Le, Marketing Associate Director, Dragon Capital	Jopy Chiang, CEO (SG property)	Vernon Chua, Founder and CEO (MA cloud retail)
15:00	<b>Asean economy</b>	<b>HRnetGroup</b>	<b>Ayala Land</b>	<b>OMS<sup>P</sup></b>
15:50	Anthony Nafte, CLSA	Adeline Sim, Executive Director and Chief Corporate Officer (SG services)	Augusto Bengzon, Senior VP, CFO and Treasurer (PH property)	Ronnie Lim, CEO (MA telecoms)
16:00	<b>Regional microstrategy</b>			
16:50	Devendra Joshi, CLSA			
17:00	<b>Digital wallet development in Asean</b>			
17:50	Monsinee Nakapanant, Co-President, Ascend Money			

### 9 March 2023 (Thursday)

Time	Lecture Hall	Classroom 1	Classroom 2	Classroom 3
8:30	<b>Southeast Asia technology investing study</b>			
9:20	Nicholas Nash, Co-Founder and Managing Partner, Asia Partners			
9:30	<b>Pursuit of the growth crown</b>	<b>Arta TechFin</b>	<b>IHH</b>	<b>Paxel<sup>P</sup></b>
10:20	Charles Ormiston, Bain Advisor Bain	Eddie Lau, CEO Joseph Jeong, Co-Head of Global Markets (HK financial services)	Joerg Ayrl, CFO (MA healthcare)	Bryant Christanto, Co-Founder and CEO (IN delivery logistics)
10:30	<b>Sustain Asia/ESG</b>	<b>SM Investments</b>	<b>Minor International</b>	<b>Food Market Hub<sup>P</sup></b>
11:20	Seungjoo Ro, CLSA	Frederic DyBuncio, President and CEO Timothy Daniels, Head of IR and Sustainability (PH conglomerates)	Namida Artispong, Director of IR (TH consumer services)	Anthony See, Co-Founder and CEO (MA F&B and ecommerce)
11:30	<b>Asia's sleeping giant</b>	<b>ComfortDelGro</b>	<b>Adaro</b>	<b>Global Electric Transport (GET)<sup>P</sup></b>
12:20	Entela Benz, Founder and CEO Intensel	Siak Kian Cheng, MD and CEO Christopher White, Head of IR (SG transportation)	Lie Luckman, CFO Danuta Komar, IR Manager (IN energy)	Freddie Tinga, President (PH transportation)
12:30	<b>Supply chain and logistics panel: A new balance</b>			
13:50	Ruengrit Tom Chaiwivat (TH), Lean Hin Ooi (MA), Eric Chan (SG)			
14:00	<b>Roadmap to 2028: IT BPO</b>	<b>Regional Reits</b>	<b>Telkom</b>	<b>Magnis Energy Technologies</b>
14:50	Jack Madrid, President and CEO IT and Business Process Association of the Philippines	Yew Kiang Wong, CLSA	Edwin Julianus Sebayang, VP IR (IN telecoms)	Frank Poullas, Executive Chairman (AU energy)
15:00	Closed	<b>Penang infra/tech themes</b>	<b>IVL</b>	<b>AwanTunai<sup>P</sup></b>
15:50		Paul Yap and Peter Kong, CLSA	Dilip Kumar Agarwal, CFO and Deputy CEO (TH petrochem)	Dino Setiawan, CEO and Co-Founder (IN fintech)
16:00	<b>PE panel: Outlook for Asean exits</b>	<b>ESR-LOGOS Reit</b>	<b>Cisarua Mountain Dairy</b>	<b>Siam Makro</b>
16:50	Thuy Dropsey, Co-Head of Asean, Affirma Capital Justine Zhou, Partner, Cathay Capital David Ireland, Senior Partner, Navis Capital	Adrian Chui, CEO (SG real estate)	Farell Sutantio, President Director and CEO (IN consumer)	Saowaluck Thithapant, CFO (TH consumer)
17:00	<b>Further unlocking growth</b>			
17:50	Septian Hario Seto, Deputy Coordinating Minister of Investment and Mining Coordinating Minister for Maritime Affairs and Investments, Indonesia			

### 10 March 2023 (Friday)

Time	Lecture Hall	Classroom 1	Classroom 2	Classroom 3
8:30	<b>China reality research</b>			
9:20	Lance Noble, CLSA			
9:30	Closed	<b>Philippines strategy</b>	<b>Thai Union</b>	<b>SATS</b>
10:20		Alfred Dy, CLSA	Ratinan Wongwatcharanon, Head of IR (TH F&B)	Kerry Mok, CEO (SG transportation)
10:30	Closed	<b>Singapore strategy</b>	<b>TDCX</b>	<b>B.Grimm Power</b>
11:20		Neel Sinha, CLSA	Edward Goh, Executive VP of Corporate Development Jason Lim, Head of IR (SG software services)	Nopadej Karnasuta, Senior Executive VP of Investment, Innovation and Sustainability (TH power/utilities)
11:30	<b>Global thematics</b>			
12:20	Shaun Cochran and Max Hopkins, CLSA			

Notes: This agenda is subject to change.

Lunch will be available for the 12:30 sessions.

P = Private company.

 Presentations will not be recorded or uploaded.

Certificates of Attendance are available to download on our conference website, [forums.clsa.com](https://forums.clsa.com).

Please note that CPT points can only be granted by delegates' internal compliance department.