

2021 APIC-REGIONAL Pension Funds & Social Security Systems Summit

(Wednesday) 3 November 2021, Hong Kong

PRIVATE INVITATION

ASIA PACIFIC INVESTORS COOPERATION

Preserving Asian Pension Plans, Sovereign Wealth Funds and Institutional Investor Assets
Connecting Capital Markets





ABOUT THE SUMMIT

Road to Recovery:
Sustainable Funding of Pension and Social Security Funds
Policy * Regulation * Investments

Social security and retirement funds experienced unprecedented member withdrawals and disbursements during the global pandemic. How can we ensure financial viability and funding of retirement funds' future liabilities?

Co-Hosted by the Hong Kong Retirement Schemes Association (HKRSA) and supported by the Hong Kong Trustees' Association, this year's session highlights participation and collaboration of the world's and Asia's leading asset management companies, regional pension plan sponsors/employers and asset owners.

The Summit provides an exclusive venue where strategies, successful implementation of innovative asset allocations, and concerns affecting the retirement industry, both in retail and institutional sectors, are discussed in a private and confidential environment.

The Summit provides a 360-degree in-depth coverage of the industry with participation and support of key stakeholders: Policy, Regulatory, Asset Owners (Pension Funds, Social Security Systems, Insurance), Plan Participants and Investment Management companies' leaders.

Sessions and meetings are private and confidential, closed to media, and are designed to produce actionable outcomes that would benefit Asian pension plan participants and asset owners. All discussions are under the Chatham House rule. The Summit is by invitation only.



PROVISIONAL AGENDA

Version 07 June 2021

APIC WORKING SESSIONS – PLENARY SESSIONS/SEMINARS

These are interactive learning sessions on products, strategies and investing trends. Please register and submit questions prior to the Sessions. Your questions shall allow Lecturers and Session Leaders to personalize topics that are most important to you.

TIME	SESSION	SPEAKERS
07:45	Registration and Welcome Coffee	Outdoor foyer
	OPENING KEYNOTE SESSION	
08:30	APIC Host Welcome Remarks and Introduction of Summit Co-Chair and Supporting Organisation	Ana SHARP Founder and Chief Executive Officer Asia Pacific Investors Cooperation (APIC) (Confirmed) <i>Co-Host and Co-Chair:</i> Doris HO Chairman Hong Kong Retirement Schemes Association (HKRSA) Executive Director Hospital Authority Provident Fund Scheme Hong Kong SAR (Confirmed) <i>Supporting Organisation:</i> Ka Shi LAU Vice Chairman Hong Kong Trustees' Association MD and CEO BCT Financial Limited (BCTF) Bank Consortium Trust Company Limited (BCTC) (Confirmed)
08:40 – 09:10	Opening Keynote Address	The Hon. Matthew CHEUNG Kin-chung, GBM, GBS, JP Chief Secretary for Administration Former Secretary for Labour and Welfare The Government of Hong Kong SAR (Confirmed)



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09:10 – 09:30	<p>Global Keynote Address Followed by Q&A</p> <p>GLOBAL AGING POPULATION: THE CONVERGENCE OF TECHNOLOGY AND HUMAN CARE IN HEALTHCARE</p>	<p>Prof. Dr. Joachim BREUER President International Social Security Association (ISSA) Switzerland (Confirmed)</p>
09:30 – 10:30	<p>Opening Keynote Discussion</p> <p>LEADERS SESSION: ENSURING SUSTAINABLE PENSION AND SOCIAL SECURITY SYSTEMS IN ASIA</p> <p>This panel of distinguished Asian leaders – asset owners and institutional investors – share their experiences and strategies as they navigate through the crests and troughs of the societal and economic impact of COVID-19.</p> <p>The global health crisis has also exposed strong links to climate change and implications to asset owners' asset allocations. What innovative or practical actions did they implement and how are they ensuring sustainability and growth of their organisations? What are the likely long-term consequences into their operational and investment strategies going forward?</p>	<p>Anggoro EKO CAHYO President Director BPJS Ketenagakerjaan Indonesia (Confirmed)</p> <p>Ashish CHAUHAN Chief Executive Officer Bombay Stock Exchange India (Confirmed)</p> <p>Paras ANAND Chief Investment Officer, Asia Pacific Fidelity International (Confirmed)</p> <p>Rolando LEDESMA MACASAET President and General Manager Government Service Insurance System Philippines (Confirmed)</p> <p>H.E. Samheng BOROS Secretary of State Ministry of Social Affairs, Veterans and Youth Rehabilitation Cambodia (Confirmed)</p> <p>Session Chair:</p> <p>Howard LEE Deputy Chief Executive Hong Kong Monetary Authority (Confirmed)</p>



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10:30 – 10:45	Coffee Break	
10:45 – 11:00	Keynote Address	Ayesha LAU Chairman Mandatory Provident Fund Schemes Authority The Government of Hong Kong SAR (Confirmed)
11:00 – 11:20	Keynote Address and Presentation	Wylie TOLLETTE Head of Multi-Asset Solutions Franklin Templeton Investments USA (Confirmed)
11:20 – 12:05	<p>Plenary Discussion</p> <p>GROWTH OF INCOME STREAM SOLUTIONS</p> <p>To ensure retirement income sustainability and affordability of retirement costs associated with longer life expectancy, the Hong Kong SAR government implemented the HKMC Annuity Plan and the Qualifying Deferred Annuity Policy (QDAP), voluntary tax deductible insurance annuity plans in 2018.</p> <p>This session will discuss recent developments, market response to annuity plans, challenges and solutions to deepen market understanding and participation.</p> <p>Other items to be discussed:</p> <ol style="list-style-type: none"> 1. Disclosure of fees, how funds are invested and types of companies invested 2. Transparency. Simple, clear, concise fund marketing materials, fees for special features and riders, and associated tax deduction, if applicable. 	<p>Sunny YUNG Executive Director and Chief Executive Officer HKMC Annuity Limited Hong Kong SAR (Confirmed)</p> <p>Doris HO Executive Director Hospital Authority Provident Fund Scheme Hong Kong SAR (Confirmed)</p> <p>Carol HUI Executive Director, Long Term Business Division Insurance Authority Hong Kong SAR (Confirmed)</p> <p>Session Chair:</p> <p>Ka Shi LAU MD & CEO BCT Financial Limited (BCTF) Bank Consortium Trust Company Limited (BCTC) (Confirmed)</p>



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12:05 – 13:00	Delegates Luncheon	
	<p>Transition to Afternoon Sessions</p> <p>AFTERNOON THEME: BECOMING A RESPONSIBLE INVESTOR</p> <p>BENCHMARKING AND MONITORING IMPLEMENTATION OF ESG & CLIMATE CHANGE MANDATES INTO ALL ASSET CLASSES</p> <p><u>Attendees:</u> The Afternoon Sessions will provide useful information and insights for Plan Administrators and Employers' Representatives delegates. Information gathered at the sessions would be disseminated to their company plan participants, allowing them to conduct informed decisions as they choose funds for their retirement investment portfolio.</p> <p><u>Speakers & Presenters:</u> Asset Owners Perspective: Pension fund and Insurance fund Chief Investment Officers share their views on asset allocation strategies.</p> <p>Fund Managers Perspective: Fund management executives and pension management experts share global trends, innovative strategies and investment products.</p>	
13:00 – 13:15	Afternoon Sessions Opening Keynote Address	<p>Dr. D.J. PANDIAN Vice President Investment Operations (Region 1) Asian Infrastructure Investment Bank (AIIB) (Confirmed)</p>
13:15 – 14:00	<p>Plenary Discussion</p> <p>CLIMATE CHANGE: POLICY LEADERS AND ASSET OWNERS COLLABORATION</p> <p>An on-the-ground, real-time assessment of collaborations between the public and private sectors in mitigating climate change consequences to societies and economies.</p>	<p>Senior Representative Asian Infrastructure Investment Bank (AIIB)</p> <p>Senior Policy Leader Asian Country</p>



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	<p>The AIIB-Amundi Climate Change Investment Framework's impact to funding sustainable infrastructure. Learnings from launch to-date. Timeline and Deliverables.</p>	<p>Session Chair:</p> <p>Senior Representative Amundi Asset Management</p>
14:00 – 14:50	<p>Plenary Discussion</p> <p>MAKING THE CASE FOR EMERGING MARKETS INFRASTRUCTURE</p> <p>A close analysis of infrastructure investment opportunities and the role of Asian and global institutional investors play in Asian infra pipelines.</p> <p>With thinner pockets brought about by pandemic-related disbursements, pension funds now focus on their ability to meet future funding obligations.</p> <p>Looking for best-in-class asset allocation strategies, is infra-exposure the answer?</p> <p>Experts discuss key considerations for:</p> <ul style="list-style-type: none"> • Core and Social infrastructure projects – how to diversify exposure to both types of infra assets, project size and timelines. Is this doable? • ESG-related Technology and Healthcare Services • Equity, Debt and Hybrid financing instruments • Risk valuations 	<p>Hans-Martin AERTS Managing Director Head of Infrastructure Investments, Asia Pacific APG Asset Management Asia (Confirmed)</p> <p>Yasong WANG President Executive CIC International (Invited)</p> <p>Jie GONG Partner Member, Asia Regional Investment Committee Panthéon Ventures (Confirmed)</p>
14:50 – 15:20	Coffee Break	
15:20 – 16:10	<p>Plenary Discussion</p> <p>BALANCING DEBT, EQUITY AND SPECIALIST FUNDS EXPOSURES</p> <p>Securing long-term stable returns is top priority for Asian pension investment teams. With the onset and proliferation of infrastructure and specialist funds, the ability to choose the right one for an institution becomes a major challenge. This session addresses key issues, what to look out for, and how to choose the right fund and strategy that meets your institution's needs. A distinguished and experienced group of asset owners share their strategies with peers.</p>	<p>Yoshitaka TODOROKI Managing Director Head of Private Equity & Infrastructure Private Market Investment Department Government Pension Investment Fund Japan (Invited)</p> <p>Henry CHAU Head of Investments The Hong Kong Jockey Club Hong Kong SAR (Confirmed)</p>



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16:10 – 16:45	<p>Closing Keynote Address A Dialogue with Hong Kong FSTB Secretary</p> <p>MOVING FORWARD: HONG KONG'S STATUS AS GLOBAL FINANCIAL CENTRE AND INTERNATIONAL ASSET MANAGEMENT HUB</p>	<p>The Hon. Christopher HUI Secretary for Financial Services and the Treasury Bureau The Government of Hong Kong SAR (Confirmed)</p> <p>Dialogue Chair:</p> <p>Dixon WONG Head, Financial Services Invest Hong Kong (Confirmed)</p>
16:45 – 16:50	Closing Remarks	<p>Ana SHARP Founder and CEO Asia Pacific Investors Cooperation (APIC)</p>
DAY 2	<u>By Invitation Only</u> ASSET OWNERS HIGH-LEVEL SUMMIT	
	<p>INFRASTRUCTURE DEVELOPMENT IN ASIA AS ECONOMIC GROWTH DRIVER</p> <ul style="list-style-type: none"> Balancing Economic, Climate Change and ESG needs to achieve growth targets Innovation and collaboration <p>Asset owners discuss the challenges and opportunities in investing into core infrastructure, healthcare, water, sanitation and education in the Region.</p> <p>COVID-19 has highlighted that people's health and the quality of social infrastructure have direct impact on economies.</p> <p>How do governments, institutional investors and pension funds work together to achieve long-term, stable returns while addressing health care and social needs of its people?</p>	<p>Invited Official Delegations:</p> <p>Ministry of State-Owned Enterprises Republic of Indonesia</p> <p>Ministry of Physical Infrastructure and Transport Government of Nepal</p> <p>Ministry of Social Affairs, Veterans and Youth Rehabilitation Cambodia</p> <p>BPJS Ketenagakerjaan Indonesia</p> <p>CIC International (HK) Co. Ltd.</p> <p>Employees Provident Fund Malaysia</p> <p>Government Pension Investment Fund Japan</p>



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		<p>Government Pension Fund Thailand</p> <p>Government Service Insurance System Philippines</p> <p>National Fund for Veterans Cambodia</p> <p>National Social Security Fund Cambodia</p> <p>National Social Security Fund for Civil Servants, Cambodia</p> <p>Home Development Mutual Fund Philippines</p> <p>Philippine Health Insurance Corporation, Philippines</p> <p>Social Security System, Philippines</p> <p>National Social Security Fund Lao PDR</p> <p>Social Security Organisation Malaysia</p> <p>Thailand Social Security Office</p> <p>Vietnam Social Security</p>
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Asia Pacific Investors Cooperation

Host

Asia Pacific Investors Cooperation (APIC) is a private strategic business network and investor-education platform created by and for Asian institutional investors: pension plans, SWFs, government funds, social security systems, and insurance companies. APIC covers 22 Asia Pacific markets and represents US\$30 trillion AUM. APIC is not linked to any media or publishing group. All APIC sessions are under Chatham House rule. All discussions are private and confidential giving freedom for its participants to tackle issues that matter most to them and their businesses. Attendance at all APIC sessions is free and by invitation only.



Co-Host

Established in 1996, the Hong Kong Retirement Schemes Association (HKRSA) is a not-for-profit, non-political association to lead and promote sustainable and better retirement outcomes in Hong Kong through the following:

- Empower – We empower employees through employers with retirement planning and tools
- Advocate – We advocate key retirement issues, retirement income and look for value creation
- Share – We share and facilitate retirement information and knowledge



Supporting Organisation

The Hong Kong Trustees' Association was established in 1991 by members of the trust and fiduciary services sector to represent the trust industry in Hong Kong, particularly in the areas of advocacy, legislation, raising best practice/standards, education and professional development. It is a not-for-profit company limited by guarantee and incorporated in Hong Kong with more than 110 corporate members which represents thousands of professionals working in the trust, pensions, private banking, asset servicing, legal, accounting and other professional services fields. The Association launched the accreditation programme from 2018, people can acquire the Certified Trust Practitioner (CTP) designation via the Trust Training Certificate (TTC) course or Experienced Practitioners Exemption (EPE).



Acknowledgement

Asia Pacific Investors Cooperation wishes to extend its thanks and appreciation to the following institutions for their invaluable support to the 2021 APIC-REGIONAL Pension Funds and Social Security Systems Summit

Co-Host



Supporting Organisation



Summit Partners



Co-Sponsors





SPONSORSHIP INVITATION
2021 APIC-REGIONAL PENSION FUNDS AND SOCIAL SECURITY SYSTEMS SUMMIT

HKRSA HKTA Member

Asia Pacific Investors Cooperation (APIC) annual sessions are FREE, by invitation only and exclusive to qualified institutional investors. As such, APIC invites and seeks the support of fund management companies and consultancy firms for each session as sponsors.

	<u>Benefits</u>	HKRSA HKTA
1	Identified as	<u>Co-Sponsor</u>
2	Speaking Spots	
	a. Panel Speaker	√
3	Company Representatives as Delegates (Plus Speaker)	
	a. Summit	Two (2)
4	Direct Marketing and Strategic Advertising to APIC asset owners network. a. Research Material or White Paper to be placed in APIC website to the lead-up and one month after Summit. b. Distribution of e-copies to all confirmed delegates on the day of the Summit.	One (1)
5	Promote Company Capabilities at the Summit. Enhance and effectively promote Company capabilities through interactive sessions and dialogues in a subtle but effective manner that is conducive to asset owners' sensitivities.	√
6	Logo branding in summit discussions: final agenda brochure, luncheon acknowledgement cards.	√
7	Sponsorship Fee, excluding taxes and bank transfer fees.	<u>US\$12,500</u>
8	Confidentiality. The terms of this sponsorship agreement are private and confidential. The Sponsor agrees that the terms of this agreement must not be shared with any third-party company or individuals. APIC is strictly a no-marketing educational platform for asset owners. As such, sponsors agree to abide by this policy of No Marketing/Sales pitches during keynote address and Hosted-Panel session. All presentations and speeches will be pre-approved by APIC prior to the event. Sponsors agree not to hold parallel meetings or conferences during the Summit period, and/or outside the official summit agenda.	



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SPONSORSHIP CONFIRMATION & AGREEMENT

COMPANY NAME

AUTHORISED EXECUTIVE NAME / TITLE / SIGNATURE

SPONSORSHIP LEVEL: _____ CO-SPONSOR _____

Date: _____

FOR ASIA PACIFIC INVESTORS COOPERATION (APIC):

Ana Sharp
Founder and CEO
Date:



DELEGATE PASS

	Price Per Ticket	Group Ticket (4+)
HKRSA Member	US\$ 980 each	US\$750 each
HKTA Member	US\$ 980 each	US\$750 each
Non-Member	US\$ 1,000 each	US\$800 each

COMPLIMENTARY PASSES

A limited number of complimentary passes for asset owners (corporate and public pension funds, insurance investment team, sovereign wealth funds) are available on a first come, first served basis.



www.ap-investorscooperation.org

For further information:

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