



Investing Strategies During the Time of Pandemic and Beyond 疫情影響下的投資策略

Financial markets volatility causes unease and uncertainty and investors are concerned about the performance of their investment portfolios. While year-to-date, Chinese and Hong Kong stocks have been volatile amid the pandemic and geopolitical events. Franklin Templeton and Taikang Asset invite you to join this webinar so to give you greater clarity in the fog and examine the outlook of Chinese and Hong Kong equities as we head into the fourth quarter of an eventful year 2020 and plan for 2021.

當前投資市場的大起大落常讓人感到不安和困惑，許多人都對自己的投資感到擔憂。而年初至今，中港股市在新冠疫情和環球政治影響下，一直表現反覆。此網絡研討會將幫助您在當下的市場撥雲見日，並在進入2020年第四季度之際，與您審視中港股票前景和2021大市前瞻。

Part I : Uncharted Waters: Navigating Market Volatility in a Coronavirus World

第一部分：探路未知：如何穿越新冠疫情下的市場波動

- Franklin Templeton Investment 富蘭克林鄧普頓投資

- Place current market shocks in historical and global perspective 從歷史以及環球市場的宏觀角度看待本次疫情
- Understand central banks' actions to react to market corrections 介紹主要經濟體的財政與貨幣政策
- Recognize your emotions and identify three strategies to living with market volatility 瞭解投資情緒以及分享三個應對市場波動的對策

Part II : Chinese & Hong Kong Equities: Outlook on Key Market Risks & Opportunities

第二部分：聚焦中港股票：市場風險與機遇

- Taikang Asset Management 泰康資產管理

- Analyze key fundamental factors and growth forecast 分析主要基本面因素和增長預測
- Compare valuations in a global context 比較全球股市估值
- Examine fund flows and liquidity factors 審視資金流向和流動性因素
- Opportunities in Stock Connect and Greater Bay Area 滬深港通和大灣區機遇

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Event Details 活動詳情

Date & Time: 8 October 2020 (Thursday) 3:00pm-4:30pm

日期及時間: 2020年10月8日 (星期四) 下午三時至四時卅分

Login: Details will be emailed to participants on 7 October 2020 (Wednesday)

登錄: 詳情會於2020年10月7日 (星期三) 通過電子郵件發送給參加者

Language & Fee: Cantonese | Free

語言及費用: 廣東話 | 全免

Register now to learn about the changes, opportunities and more!

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Note

注意:

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Event Programme 活動流程

15:00 - 15:10 Opening Remarks 歡迎辭

Ms. Ka Shi Lau 劉嘉時女士

HKRSA, Executive Committee Member 香港退休計劃協會委員會成員

BCT Group, Managing Director & CEO BCT銀聯集團董事總經理及行政總裁

15:10 - 15:40 Part I Speaker 第一環節講者

Ms. Daphne Yang, CFA 楊瑞蘋女士, 特許金融分析師

Head of FT Academy, Asia 富蘭克林鄧普頓學院亞洲區總監

Franklin Templeton Investments 富蘭克林鄧普頓投資

15:40 - 16:10 Part II Speaker 第二環節講者

Mr. Ray Chan 陳俊文先生

Executive Director - Product, Sales & Marketing 產品、銷售及市場部執行董事

Taikang Asset Management, 泰康資產管理

16:10 - 16:25 Q&A 問答環節

Speakers 講者: Ms. Daphne Yang 楊瑞蘋女士, 特許金融分析師

Mr. Ray Chan 陳俊文先生

Facilitator 主持人: Ms. Ka Shi Lau 劉嘉時女士

16:25 - 16:30 Closing 致謝辭

Mr. Vincent Chow 周文堅先生

HKRSA, Executive Committee Member 香港退休計劃協會委員會成員

The Hongkong Electric Co. Ltd., Group Treasurer 香港電燈公司集團司庫



Ms. Daphne Yang, CFA 楊瑞蘋女士, 特許金融分析師
Head of FT Academy, Asia 富蘭克林鄧普頓學院亞洲區總監
Franklin Templeton Investments 富蘭克林鄧普頓投資

Daphne Yang joined Franklin Templeton Investments in May 2008. In this role, she oversees investment and sales training for external financial institutions as well as internal departments in Asia. She also speaks for client educational seminars, publishes investment articles, and designs both classroom and online training in English, Mandarin and Cantonese. 楊瑞蘋女士於2008年5月加入富蘭克林鄧普頓投資, 主管亞洲區培訓部門, 並主持公司內部與對外金融機構線上和線下投資教育課程, 帶領團隊研發設計新的培訓專案。

Prior to joining Franklin Templeton, Ms. Yang worked as Senior Asset Allocation Analyst and Associate Vice President with Oppenheimer Asset Management, providing investment advisory on asset allocation and portfolio construction to high net worth clients. 在加入富蘭克林鄧普頓投資之前, 楊女士在位於美國紐約市的歐本海默資產管理顧問公司 (Oppenheimer Asset Management) 擔任銷售與市場業務拓展部門的資深資產配置分析師兼助理副總裁。

Before working in financial industry, she was in public relations for businesses and politicians in both Taiwan and China and was once a journalist covering political news in Taiwan. 在進入金融服務業前, 楊女士在公關界亦有多年的經驗, 曾為臺灣與中國內地的數個機構及政治人物提供公共關係的專業諮詢。另外, 她也曾擔任過臺灣媒體的政治新聞記者。

Ms. Yang earned an M.B.A. with dual majors in Finance and Statistics from Baruch College, City University of New York in U.S. She is also a Chartered Financial Analyst (CFA) Charterholder. 楊女士畢業於臺灣國立中正大學, 之後在美國取得紐約市立大學博魯克學院 (Baruch College, CUNY) 的企業管理碩士 (MBA) 學位, 雙主修財務金融學與統計學。楊女士亦擁有特許金融分析師 (CFA) 的執照。她精通英語、普通話及廣東話。



Mr. Ray Chan 陳俊文先生
Executive Director - Product, Sales & Marketing 產品、銷售及市場部執行董事
Taikang Asset Management, 泰康資產管理

Ray possesses 20 years of asset management industry experience with global asset management firms in mutual funds and ETF distribution, strategic planning, and management roles. In his current role at Taikang Asset (HK), Ray focuses on pension, MPF, and mutual fund distribution business developments. Ray在國際資產管理行業內擁有共20年的基金和ETF分銷、策略規劃以及管理經驗。現時在泰康資產(香港)專注於退休金、強積金市場和零售基金分銷業務發展。

Prior to joining Taikang Asset (HK), Ray served for 8 years at State Street Global Advisors. He was Head of SPDR ETFs in Hong Kong leading the company's strategic focus in ETF distribution across market segments in the region covering institutional, MPF, and financial intermediary channels. At State Street, Ray also served as the business head for the Tracker Fund of Hong Kong, the first ETF listed in Hong Kong, where he led the efforts in working with regulators, the exchange, and market participants to promote multiple long term industry development programs including Mainland China and Hong Kong cross-border ETF connect initiatives. 在加入泰康資產(香港)之前, Ray在美國道富環球投資管理公司服務了8年。他在任道富時是SPDR ETF的香港業務主管, 負責領導和管理公司跨區域市場, 包括機構、香港強積金和財富管理金融機構的ETF分銷策略工作。在任道富期內, Ray還擔任香港首支交易所上市基金- 盈富基金的業務主管, 並領導與監管機構、交易所和市場參與者合作, 促進包括中國內地和香港跨境ETF通等多項長期行業發展計劃。

Ray started his asset management career at Schroder Investment Management in year 2000. He also worked in business development and management roles at other renowned asset management firms including Legg Mason, Allianz, and BEA Union. Ray於2000年在施羅德投資管理公司開始他的資產管理業務生涯。他還曾在安聯投資和東亞聯豐等知名資產管理公司擔任業務發展和管理職務。

Our Facilitator 主持人



Ms. Ka Shi Lau 劉嘉時女士

HKRSA, Executive Committee Member 香港退休計劃協會委員會成員
BCT Group, Managing Director & CEO BCT銀聯集團董事總經理及行政總裁

Ka Shi Lau is the Managing Director & CEO of BCT Group - comprising BCT Financial Limited ("BCTF") and Bank Consortium Trust Company Limited ("BCTC"), a key provider of MPF/ORSO products and best-in-class asset servicing for investment funds and pensions with BCTC being one of the largest trust companies in Hong Kong. 劉嘉時女士為BCT銀聯集團董事總經理及行政總裁。BCT由「銀聯金融有限公司」(「BCTF」)及「銀聯信託有限公司」(「BCTC」)組成，為香港主要強積金公司及最大信託公司之一，專門提供退休產品及為投資基金與退休金提供資產管理服務。

Graduated with an MBA from Cornell University in the US, Ka Shi possesses extensive banking and finance experience in the pension and funds industry, and she is a strong advocate of corporate governance (including ESG), retirement protection, social inclusion and diversity, and health care through active participation in government consultations and industry dialogues. 劉女士為美國康乃爾大學工商管理碩士，她在退休金及基金行業擁有豐富的銀行及金融方面的經驗，一直透過參與政府的諮詢工作及與業界的溝通，積極推動與企業管治(包括「環保、社會、管治」ESG)、退休保障、社會多元共融及醫療護理相關的議題。

Apart from her current role (as former chairman also) at the HKRSA, she serves on various statutory and professional bodies including the MPFA, SFC, Hong Kong Trustees' Association, Hong Kong Securities and Investment Institute, Hong Kong Institute of Certified Public Accountants, Investor and Financial Education Council, and Asian Corporate Governance Association. Her public service roles include Our Hong Kong Foundation, the Independent Commission (on Remuneration for Members of the Executive Council and the Legislature, and Officials under the Political Appointment System of the HKSAR), and the Pamela Youde Nethersole Eastern Hospital while her previous public services include the Minimum Wage Commission, Hospital Authority, Women's Commission, Financial Services Development Council and Trade Development Council. 現時，她除了出任香港退休計劃協會的職務(亦曾任協會主席)，同時為多個法定及專業組織服務，當中包括積金局、證監會、香港信託人公會、香港證券及投資學會、香港會計師公會、投資者及理財教育委員會，及亞洲公司治理協會。劉女士亦擔任多項公職，包括服務於團結香港基金、「香港特別行政區行政會議成員、立法會議員及政治委任制度官員薪津獨立委員會」，及東區尤德夫人那打素醫院；她也曾服務於最低工資委員會、醫院管理局、女性事務委員會、香港金融發展局及香港貿發局。

For her dedicated public and community service in Hong Kong, Ka Shi was awarded the Bronze Bauhinia Star (BBS) by the HKSAR Government in 2013. She was the first woman to win the "Director of the Year Award" in the "Private Companies, Executive Director" category from The Hong Kong Institute of Directors. She was also named "Professional of the Year" in the "Women of Influence Awards 2010" co-organised by the American Chamber of Commerce in Hong Kong and the South China Morning Post, and in 2018 was selected by AsianInvestor as one of the "AI 20 Leading Pension Executives" in the region. 她於2013年獲香港特別行政區政府頒授「銅紫荊星章」(BBS)勳銜，表揚她對公眾及社區作出的貢獻。此外，她是首位女性獲香港董事學會頒發私人公司執行董事組別之「傑出董事獎」；另於美國總商會與《南華早報》合辦的2010年「具影響力的女性」獎項中獲選為「年度最佳專才」，並於2018年獲AsianInvestor雜誌("AI")選為亞太區「AI退休金領袖」。