

The logo for HKRSA, featuring the letters 'HKRSA' in a white, bold, sans-serif font inside a dark green rectangular box with a white border.

香港退休計劃協會

The Hong Kong Retirement Schemes Association



# THE ROARING TWENTIES

THE HKRSA 25TH ANNUAL DINNER

21 OCT 2021

Renaissance Harbour View Hotel Hong Kong

6:30pm

# THE ROARING TWENTIES

## THE HKRSA 25TH ANNUAL DINNER

### PLATINUM SPONSORS



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## RUNDOWN

TIME	ITEM
6:30 pm – 7:00 pm	Registration Reception
7:00 pm – 7:10 pm	Welcome <ul style="list-style-type: none"><li>- Emcee Welcome</li><li>- Chairman Welcome</li><li>- Toasting by ExCo</li></ul>
7:10 pm - 7:35 pm	Table Prize Appetizer
7:35 pm – 8:35 pm	Main Course
8:35 pm – 9:05 pm	Lucky Draw Dessert + Coffee / Tea
9:05 pm – 10:00 pm	Networking
10:00 pm	End

Remarks: No table service during speech & phototaking

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## About AIA Corporate Solutions

AIA Corporate Solutions has provided employee benefit solutions to companies of all sizes in Hong Kong and Macau for over 60 years. Our expertise and customer-centric values have made us an established industry leader known for one-stop group insurance, pension and employee voluntary protection solutions that stand for value, choice and simplicity.

Leveraging our extensive experience, we aim to meet the medical and retirement protection needs of the territory's diverse workforce. Our solutions benefit small-to-medium-sized companies and multinational corporations, helping them advance their business goals and meet their human resource objectives in a flexible and cost-effective manner.

## About AIA Hong Kong and AIA Macau

AIA Group Limited established its operations in Hong Kong in 1931. To date, AIA Hong Kong and AIA Macau have close to 20,000 financial planners<sup>1</sup>, as well as an extensive network of brokerage and bancassurance partners. We serve over 3.3 million customers<sup>2</sup>, offering them a wide selection of professional services and products ranging from individual life, group life, accident, medical and health, mandatory provident fund, personal lines insurance to investment-linked products with numerous investment options. We are also dedicated to providing superb product solutions to meet the financial needs of high net worth customers.

<sup>1</sup> As at 30 June 2021

<sup>2</sup> AIA Hong Kong internal data includes Hong Kong and Macau's individual life, group insurance and pension customers (as at 30 June 2021)

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BCT Group, comprising BCT Financial Limited (“BCTF”) and Bank Consortium Trust Company Limited (“BCTC”), is a leading provider of MPF/ORSO solutions and best-in-class asset servicing for global investment funds and pensions. We manage over 1.2 million pension accounts for members in Hong Kong and around the world. Asset under administration as of June 2021 amounted to HK\$222 Billion.

With corporate governance, sustainability (including ESG) and sense of purpose as the foundation, BCT is committed to serving and creating value for all stakeholders. BCT sums up the corporate purpose: “b” for “bringing value” with innovation and insight; “c” for building “connectivity” with stakeholders through collaboration; “t” for being a “trusted” partner of these stakeholders. Destined to build a sustainable future with stakeholders, **BCT is “Shaping Tomorrow With You Now”!**

## 2021 Best of the Best Awards Asia Asset Management

Best MPF Scheme Provider – 20 Years

Lifetime Achievement Award – MPF  
for Ms Ka Shi Lau, MD&CEO

## 2020 BENCHMARK Fund of the Year Awards BENCHMARK

Provider of the Year

Employer Support, BEST-IN-CLASS

Investor Education, BEST-IN-CLASS

Risk Management, BEST-IN-CLASS

Human Capital Development, BEST-IN-CLASS

Member Servicing, OUTSTANDING ACHIEVER

## 2021 MPF Awards MPF Ratings

MPF Ratings 2021 Gold Rated Scheme

Best Administration Award

Best Member Servicing Award

## 2020 Sustainable Business Award World Green Origination

Sustainable Business Award

Sustainable Leadership Award

## IFTA FinTech Achievement Award 2020 Institute of Financial Technologists of Asia

eMPF Tech Gold Award

Good MPF Employer Award 2020-21  
Mandatory Provident Fund Schemes Authority

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## About Manulife Financial Corporation

Manulife Financial Corporation is a leading international financial services provider that helps people make their decisions easier and lives better. With our global headquarters in Toronto, Canada, we operate as Manulife across our offices in Canada, Asia, and Europe, and primarily as John Hancock in the United States. We provide financial advice, insurance, and our global wealth and asset management segment, Manulife Investment Management, serves individuals, institutions and retirement plan members worldwide. At the end of 2020, we had more than 37,000 employees, over 118,000 agents, and thousands of distribution partners, serving over 30 million customers. As of June 30, 2021, we had C\$1.3 trillion (HK\$8.1 trillion) in assets under management and administration, and in the previous 12 months we made C\$31.3 billion in payments to our customers. Our principal operations are in Asia, Canada and the United States where we have served customers for more than 155 years. We trade as 'MFC' on the Toronto, New York, and the Philippine stock exchanges and under '945' in Hong Kong.

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**Mercer** believes in building brighter futures by redefining the world of work, reshaping retirement and investment outcomes, and unlocking real health and well-being.

Our Hong Kong pension and investment consulting team is committed to help employers make a difference to their employees' lives in retirement, and to align the pension proposition to employer's culture and sustainability goals. Our surveys benchmark against 140+ employers covering over 60,000 members in Hong Kong, we support the actuarial reporting on 300+ plans annually, and conduct member education and communication sessions for over 10,000 members in Hong Kong.

Mercer's more than 25,000 employees are based in 44 countries and the firm operates in over 130 countries. Mercer is a business of Marsh McLennan (NYSE: MMC), the world's leading professional services firm in the areas of risk, strategy and people, with 76,000 colleagues and annual revenue of over \$17 billion. Through its market-leading businesses including Marsh, Guy Carpenter and Oliver Wyman, Marsh McLennan helps clients navigate an increasingly dynamic and complex environment.

We are also proud to share that it is Marsh McLennan's 150 years anniversary, and we will continue our commitment to making a difference in the communities we live and work.

P.A.G.E 150

## Helping to Power Asian Girls Education (P.A.G.E)

The COVID-19 pandemic has left millions of girls at risk of school dropout in Asia-Pacific. Mercer launches P.A.G.E 150, a regional initiative to empower organisations that support girls' education in Asia.

**P.A.G.E 150** which stands for Powering Asian Girls Education, is our way of giving back to our communities by uplifting the millions of girls whose education have been disrupted by the COVID-19 pandemic. It's our way of giving these girls, who have aspirations of providing for themselves and their families and contributing to their country's economies, a chance at fulfilling their potential and dreams. Mercer is committing our time and expertise to support local non-profits and social enterprises dedicated to helping disadvantaged girls and women build brighter futures.



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## Ninety One

Investing for a world of change

Ninety One was previously known as Investec Asset Management.

We started in South Africa, in '91. Back then, change was coming. Along with its challenges came the chance to invest in a better future. Our journey through that time taught us to recognise and embrace change and uncertainty. Change taught us to be bold. Resilient. Agile.

To believe that active investing can be a force for good.

Today, we still see the world from a different perspective. Whether it is the rise of the East or the rise of the machines, we'll always seek to make the best of it. Best for our clients, best for our company, and the best for the world we live in. We are investing for a world of change.

We began as Investec Asset Management, a small start-up based in South Africa offering domestic investment strategies. In 2020, almost three decades of growth later, we demerged from Investec Group to become Ninety One, an independent asset manager listed on the London and Johannesburg Stock Exchanges.

While our name may have changed, we're still the same firm. We offer distinctive investment strategies spanning equities, fixed income, multi-asset and alternatives to help institutional investors, those advising others and individuals navigate an ever-changing world. All our employees have the opportunity to own part of the firm. We also have our founding leadership in place. Our distinctive owner culture allows us to commit to building a long-term, intergenerational business. It supports a business fully aligned with our clients' long-term investment objectives.

We focus on where we can make a real difference for our clients. We work with clients based all over the world who have entrusted us to manage US\$192 billion in assets (as at 30.06.21).

[www.ninetyone.com](http://www.ninetyone.com)



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## Amundi

ASSET MANAGEMENT  
東方匯理 資產管理

### About Amundi

Amundi, the leading European asset manager, ranking among the top 10 global players<sup>1</sup>, offers its 100 million clients - retail, institutional and corporate - a complete range of savings and investment solutions in active and passive management, in traditional or real assets.

With its six international investment hubs<sup>2</sup>, financial and extra-financial research capabilities and long-standing commitment to responsible investment, Amundi is a key player in the asset management landscape.

Amundi clients benefit from the expertise and advice of 4,800 employees in more than 35 countries. A subsidiary of the Crédit Agricole group and listed on the stock exchange, Amundi currently manages more than €1.8 trillion of assets<sup>3</sup>.

*Amundi, a Trusted Partner, working every day in the interest of its clients and society*

[www.amundi.com](http://www.amundi.com)



<sup>1</sup> Source: IPE "Top 500 Asset Managers" published in June 2021, based on assets under management as at 31/12/2020

<sup>2</sup> Boston, Dublin, London, Milan, Paris and Tokyo

<sup>3</sup> Amundi data as at 30/06/2021



## FRANKLIN TEMPLETON

富蘭克林鄧普頓

### About Franklin Templeton

Franklin Resources, Inc. [NYSE:BEN] is a global investment management organization with subsidiaries operating as Franklin Templeton in over 165 countries. Franklin Templeton's mission is to help clients achieve better outcomes through investment management expertise, wealth management and technology solutions. Through its specialist investment managers, the Company brings extensive capabilities in equity, fixed income, alternatives and custom multi-asset solutions. With employees in over 30 countries, including 1,300 investment professionals, the California-based Company has more than 70 years of investment experience and approximately \$1.55 trillion in assets under management as of June 30, 2021. For more information, please visit [www.franklintempleton.com.hk](http://www.franklintempleton.com.hk).

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## J.P.Morgan Asset Management

J.P. Morgan Asset Management (“JPMAM”) is a global leader in investment management, dedicated to collaborating with clients in an effort to build stronger portfolios. For more than 150 years and across all market cycles, JPMAM has been helping to solve the needs of the world’s most sophisticated institutional investors, with a proven track record of success. As of June 2021, the firm is entrusted with approximately \$2.6 trillion in assets under management.

With the reputation for innovation and market leadership, JPMAM is committed to helping clients reach their financial goals by providing a broad spectrum of investment capabilities across all asset classes. Through actively sharing expertise, empowering better decisions with industry-leading market insights and tools, and providing a broad range of investment solutions, JPMAM is committed to dynamically responding to client needs.

JPMAM’s commitment and disciplined investment approach is recognised by investors worldwide. JPMAM believes that assets are best managed by specialists located in the markets and regions in which they invest. With over 1000 investment professionals globally, JPMAM portfolio managers have direct access to local market knowledge wherever they are based. Moreover, through proprietary research and company visits, investment teams are able to identify those companies with superior long-term potential, and those that can react quickly to market changes – a philosophy that has proven successful over the years.

JPMAM also sees increasing focus on environmental, social and governance issues as a signatory to the UN Principles for Responsible Investment since 2007. Our Sustainable Investment Leadership Team and our dedicated sustainable investing resources together drive a coordinated strategy for sustainable investing globally.

Specifically in Hong Kong, JPMAM is one of the most established asset management companies with over 50 years of regional experience. The Hong Kong Institutional Business covers some of the largest and most sophisticated institutions, from corporate pensions, government entities, endowments to insurance companies. We are committed to understanding our client’s investment objectives and applying our intellectual capital to deliver outstanding investment outcomes.

## T.RowePrice

Founded in 1937, Baltimore-based T. Rowe Price Group, Inc. ([troweprice.com](http://troweprice.com)) is a global investment management organization with US\$1.62 trillion in assets under management<sup>1</sup> as of 30 June 2021. The organization provides a broad array of mutual funds, subadvisor services, and separate account management for individual and institutional investors, retirement plans, and financial intermediaries. The company also offers sophisticated investment planning and guidance tools. T. Rowe Price’s disciplined, risk-aware investment approach focuses on diversification, style consistency, and fundamental research.

<sup>1</sup> Firmwide AUM includes assets managed by T. Rowe Price Associates, Inc. and its investment advisory affiliates.

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#### 泰康資產(香港) Taikang Asset (HK)

Taikang Asset Management Co., Ltd. (Taikang Asset) was established in 2007 as an investment arm of the parent company Taikang Insurance Group, a leading financial conglomerate in China and one of the Fortune Global 500 Companies. In 2007, Taikang Asset Management (Hong Kong) Co., Ltd (Taikang Asset (HK)) was incorporated as the overseas investment center.

As of June 2021, Taikang Asset managed over 2.4 trillion yuan in total assets, of which the third-party clients assets managed for banks, insurance companies, pensions, and sovereign entities are over 1.4 trillion yuan. Taikang Asset is also the largest pension manager in China, with over 580 billion yuan of pension assets under management across the basic pension, occupational annuity, and enterprise annuity. In December 2016, Taikang Asset was elected as one of the investment managers for China's National Social Security Fund.

Taikang Asset has extensive investment experience in the China capital markets across a broad range of asset classes, including fixed income, equity, infrastructure, real estate, private equity, and other financial products. Managing China related assets has been our core business and strength, 375 out of 996 personnel at the firm are investment professionals fully dedicated to China related strategies. Leveraging on our large on-the-ground investment resources, extensive research coverage, and well-established investment platform, Taikang Asset has been successfully managing assets for the parent company and global investors on investing in the China markets. Over the past five years, our AUM for the third party clients have increased at around 19% CAGR (36% CAGR for pension fund, 23% CAGR for enterprise annuity), making us one of the fastest growing asset managers in China and Hong Kong.



#### HSBC MPF

HSBC has been recognised as one of the leading MPF service providers in Hong Kong since the commencement of MPF in December 2000. We are dedicated to providing our customers with comprehensive wealth management solutions and customer-centric services through multiple channels. With over 40 years of experience in administration of retirement schemes and management of retirement funds in Hong Kong, we are a provider that you can trust. Our scheme won 32 prestigious awards last year<sup>1</sup>, including the Gold Rating scheme by MPF Ratings<sup>2</sup>. As of end September 2021, HSBC MPF serves over 1.4 million MPF customers in Hong Kong.

Investment Managers of the HSBC MPF Funds include HSBC Global Asset Management and Hang Seng Investment Management. HSBC Global Asset Management is the asset management division of HSBC, which aims to connect HSBC's customers to global investment opportunities with their international expertise and local insights. Their disciplined investment process with robust philosophy and dependable risk management helps to deliver sustainable performance. HSBC Global Asset Management offers a comprehensive range of capabilities, including equity, fixed income, multi-asset, alternatives and liquidity, to meet our customers' investment needs. As of 30 June 2021, HSBC Global Asset Management managed assets totaling USD625 billion<sup>3</sup>. Hang Seng Investment Management, who manages the underlying ETFs of the index tracking funds, is the second largest ETF provider in terms of fund under management as of end August 2021, with the total AUM amounted to HKD190.3 billions<sup>4</sup>.

<sup>1</sup> From 1 July 2020 to 30 June 2021. Source: HSBC MPF Website, please refer to [www.hsbc.com.hk/mpf/awards/](http://www.hsbc.com.hk/mpf/awards/)

<sup>2</sup> MPF Ratings. The awards and rating were based on MPF Ratings' assessment criteria. For the awardee, assessment and rating criteria/methodology, please refer to <https://mpfratings.com.hk/ratings-and-awards/>

<sup>3</sup> Source: HSBC Global Asset Management as at 30 June 2021. Any differences are due to rounding.

<sup>4</sup> The analysis is based on the data provided by HKEX

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