

## Morningstar Asia Announces Speakers, Agenda for Inaugural Pan-Asian Investment Conference

Written by Australian Business  
Tuesday, 03 June 2014 18:20

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*Keynote speakers include Professor KC Chan, secretary for Financial Services and Treasury, Hong Kong S.A.R.; Morningstar founder and CEO Joe Mansueto; GaveKal Dragonomics' head of research Arthur Kroeber; and First State Investment's director of greater China equities, Martin Lau*

SHEN ZHEN, CHINA -- [Media OutReach](#) -- June 4, 2014 -- [Morningstar Asia Limited](#) , a subsidiary of [Morningstar, Inc.](#)

(NASDAQ: MORN), will host its inaugural investment conference in Asia for financial institutions on Thursday, June 12, at the Mandarin Oriental Hong Kong.

**Professor KC Chan**, secretary for Financial Services and the Treasury of Hong Kong S.A.R., will present the morning keynote speech about the Renminbi (RMB) and the asset management industry, followed by **Joe Mansueto**, founder and chief executive officer of Morningstar, Inc. Other keynote speakers are

**Arthur Kroeber**

, head of research for Gavekal Dragonomics, who will offer a macro-economic briefing, and

**Martin Lau**

, director of greater China equities at First State Investments, who will speak about the development of Asia's asset management industry.

"The theme for our inaugural Morningstar Investment Conference in Asia is 'Income, Growth, and Alpha' as we seek to help investors identify and capture the full spectrum of returns from income, capital growth, and alpha opportunities," Grant Kennaway, Morningstar's director of manager research for Asia Pacific, said. "We've selected a fantastic line-up of prominent financial thinkers to share their views about navigating today's market environment. Our agenda includes analysis on the current macro-economic and regulatory environment for Asian investors as well as key, bottom-up security selection issues. Delegates will come away equipped with new insights and practical portfolio construction solutions for their clients."

## Panel Sessions

- **Christina Chung**, head of greater China Equity, Allianz Global Investors; **Nicholas Yeo**, director and head of China/ Hong Kong equities, Aberdeen Asset Management; and **Sam le Cornu**, senior portfolio manager, Asian listed equities, Macquarie Investment Management, will discuss issues ranging from corporate governance to benchmark composition and outline how they identify opportunities in this challenging market.
- **Stephen Chang**, managing director of Asian fixed income, JPMorgan; **Robert Mead**, managing director and head of Asia Pacific credit, PIMCO; and **Emil Nguy**, founding partner and group chief investment officer, Income Partners, will share their views about market development and identify key areas of opportunities and risks for investors.
- **Douglas Yones**, head of ETFs, Asia, Vanguard; **Jane Leung**, managing director and head of iShares, Asia Pacific; and **Chen Ding**, CEO, CSOP Asset Management, will discuss how much of the income, growth, and alpha opportunities mentioned during the day can be applied through the use of the growing crop of cost-effective exchange-traded funds (ETFs).
- **Andrew Lill**, chief investment officer, Asia Pacific, Morningstar's Investment Management group; **Wing Chan**, director of manager research, Asia; **Scott Burns**, director of global manager research; and **Jin Tao**, director of Morningstar Investment Management Asia, will address major investment themes, from securing income to seeking capital growth and alpha to provide guidelines about how to apply these ideas to build and manage client portfolios.

## Research Capabilities Sessions

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Morningstar's Burns will discuss what asset flows say about global investment trends, and Thomas Idzorek, president of Morningstar Investment Management, will review the traditional Markowitz model and explore a number of alternatives as well as the future development of portfolio construction. Joel Bloomer, Morningstar's head of equity and credit research, Asia Pacific, will shed light on the relevance of economic moats, or sustainable competitive advantages, in securities analysis.

### Registration Information

The Morningstar Investment Conference in Asia costs USD 650 per pass for institutional investors and USD 2,500 for non-institutional investors, which includes a full-day conference, breakfast, lunch, two tea breaks, and a cocktail reception. To register, please complete the form at <http://corporate.morningstar.com/us/asp/requestinformationhk.aspx>.

More information about the Morningstar Investment Conference in Asia, including the full agenda, hotel accommodation, registration, and continuing-education credits, is available at <http://corporate1.morningstar.com/AS/Conferences/Morningstar-Investment-Conference>.

### News Media Registration Information

Full-timemembers of the news media may receive complimentary registration to the Morningstar Investment Conference. If you are a journalist and would like to register for the conference, please contact Nelly Poon at [nelly.poon@morningstar.com](mailto:nelly.poon@morningstar.com) or +852 2973-4646.

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Morningstar expanded to Asia in April 2000 and has grown its businesses into Japan, Korea, India, mainland China, Taiwan, Singapore, Malaysia, and Hong Kong. The Asia operations not only offer timely information on mutual funds, but also insightful and independent analyses, unbiased fund ratings, and sophisticated analytical tools to help both individual and professional investors make better investment decisions.

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