

# CONFERENCE

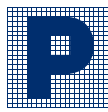
## BOOKLET

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**13<sup>th</sup> INVESTMENT  
CONFERENCE 2023**  
INVESTMENT OPPORTUNITIES BEYOND TURMOIL

**Where Investors &  
Financial Experts Converge**





# PhillipCapital

## Your Partner In Finance

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### PHILLIP INVESTOR CENTER

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\*Servicing Stockbroking

### MEMBERS OF THE PHILLIPCAPITAL GROUP

Phillip Capital Management Sdn Bhd | Phillip Mutual Berhad | Phillip Capital Sdn Bhd  
Phillip Wealth Planners Sdn Bhd | PC Quote (M) Sdn Bhd | Fame Platform Sdn Bhd  
Phillip Capital Holdings Sdn Bhd

### GLOBAL NETWORK

Singapore | Malaysia | Hong Kong | China | Japan | Indonesia | Thailand  
United Kingdom | Australia | Spain | United States | Turkey | India | UAE | Cambodia  
Vietnam



# CONFERENCE PROGRAMME

Time	Agenda		
7.30am	Guest Arrival and Guest Registration at hotel and on LMS Platform		
9.00am	Opening Remarks by Andy Lim, Group Managing Director, PhillipCapital Malaysia		
9.10am	Keynote Address by Mohd Saleem Kader Bakas, Director, Bursa Malaysia Derivatives Berhad		
9.15am	Appreciation Ceremony		
9.30am	<b>Dedollarisation - How Will It Impact The Future Investment Landscape?</b> Ang Kok Heng Chief Investment Officer, Phillip Capital Management Sdn Bhd		
10.05am	<b>Capturing Unique Emerging Market Opportunities With Bursa Malaysia Index Derivatives</b> Michael Sim Director, Synergy Link Capital Sdn Bhd		
10.40am	Coffee Break		
11.10am	<b>Asia Poised To Drive Global Growth</b> Tan Ming Han Head of Investments, Eastspring al-wara' Investments Berhad		
11.45am	<b>Market Outlook for 2H2023: Investing in Uncertain Times</b> Christopher Kok Keng Fai Head of Equities, Investment, Kenanga Investors Berhad		
12.20pm	Lunch Break		
	Concurrent Sessions at Manhattan I, Manhattan II and Manhattan III		
	Concurrent Sessions at Manhattan I, Manhattan II and Manhattan III (Online)		
	<b>Manhattan I: Beyond Borders: Navigating Global Markets</b>	<b>Manhattan II: Unveiling Asia's Investment Potential</b>	<b>Manhattan III: Exploring Alternative Avenues</b>
1.20pm	<b>Blessing In Disguise</b> Rachana Mehta Regional Co-Head of Fixed Income, Maybank Asset Management Sdn Bhd	<b>Silver Linings - Be Nimble &amp; Risk Aware</b> Woo Mun Thye Head, Investment Services, Principal Asset Management Berhad	<b>China SOEs - Is The Re-Rating Story Still Intact</b> Louis Wong Wai Kit Director, Phillip Capital Management (HK) Ltd
2.00pm	<b>Unleashing The Power Of Sustainable Future Technology</b> Tim Brown Senior Product Specialist, Janus Henderson Investors in partnership with RHB Asset Management Sdn Bhd	<b>Can Tech Perform In Such Times Of Uncertainty?</b> Bruce Zhang Portfolio Manager, CSOP Asset Management Pte Ltd in partnership with AmFunds Management Berhad	<b>Unlocking Opportunities In The Gold Market With Bursa Malaysia Gold Futures (FOLD)</b> Stephanie Lim Senior Manager, Product & Market Development, Bursa Malaysia Derivatives Berhad
2.40pm	<b>Reset Or Revolution: Discovering Investment Opportunities In The Indonesia, China &amp; US</b> Ng Chze How Head, Retail Wealth Distribution, Manulife Investment Management (M) Berhad	<b>Rising Above Financial Storms Through Crisis</b> Dr. Tan Chong Koay Founder/ Chief Strategist & Executive Chairman, Pheim Unit Trusts Berhad	<b>Malaysia's Bond Market: A Less Bumpy Road Ahead</b> Joy-Marina Choong Wai Kwin Head of Fixed Income, Investment, Kenanga Investors Berhad
3.20pm	<b>Navigating Global Equities: Opportunities And Challenges In A Dynamic Market</b> Ten Chee Seong Director, Intermediary & Private Retirement Business, ARIAM Asset Management Berhad	<b>Malaysia - An Era Of New Opportunities In Challenging Time</b> Yvonne Tan Hong Yean Head of Equities, Eastspring Investments Berhad	<b>How Total Return Strategies Can Benefit Investors - A Fund Manager's Perspective</b> Shan Kamahl Mohammad Chief Executive Officer, MIDF Amanah Asset Management Berhad
4.00pm	Tea Break		
4.30pm	<b>Forum Session: "Investment Opportunities Beyond Turmoil"</b> <b>Moderated by Yoga Lim,</b> Business Radio Producer <hr/> <b>Ryan Long</b> Head of Product & Market Development, Bursa Malaysia Derivatives Berhad <b>Yvonne Tan Hong Yean</b> Head of Equities, Eastspring Investment Berhad <b>Christopher Kok Keng Fai</b> Head of Equities, Investment, Kenanga Investors Berhad <b>Tan Teck Leng</b> Deputy Chief Investment Officer, Phillip Capital Management (S) Ltd <b>Louis Wong Wai Kit</b> Director, Phillip Capital Management (HK) Ltd <b>Ang Kok Heng</b> Chief Investment Officer, Phillip Capital Management Sdn Bhd		
5.45pm	Lucky Draw		
6.00pm	Conference Ends		





## FOREWORD BY THE ORGANIZER

In 2017, I first attended PhillipCapital Investment Conference, marking the start of my financial industry journey. As a newly invited delegate, I was inspired by the multitude of distinguished participants and speakers from Malaysia's financial sector. The event served as a vibrant platform where industry experts, hailing from diverse fund houses, shared their profound insights and market outlooks. It was the first time when I witnessed the transformation of theoretical concepts into living, breathing realities after years of tertiary education. I could only imagine the sheer amount of preparations and the collective efforts involved in orchestrating such an event, hosting a remarkable gathering of over a thousand participants. Over the years, my involvement in the conference evolved, from being a delegate to serving as a committee member. And now, as the chairperson of this year's event, I am humbled and honoured to be entrusted with this role.

The PhillipCapital Investment Conference has become a prominent event in Malaysia's financial industry. The conference serves as a hub where experts from the financial professionals, fund managers, analysts, financial planners, and even individual investors converge to exchange ideas and knowledge acquisition.

Despite the economic uncertainty this year, we maintain an optimistic outlook and firmly believe that there are ample opportunities to be seized. We hope that the circumstances we find ourselves in today can be seen as a relevant reflection of this year's conference theme, "Investment Opportunities Beyond Turmoil." We wish that this year's event will provide you with a wealth of invaluable insights, enabling the discovery of abundant opportunities within this dynamic market.

Organising an event of such magnitude has never been an easy feat, particularly for a company whose primary focus lies outside of event planning. Nonetheless, armed with the knowledge imparted by our esteemed advisors, we have managed to successfully host this conference year after year. The process of organising this event has not only stretched our capabilities but has also exposed our committee members to diverse learning opportunities beyond their daily responsibilities, potentially unearthing hidden talents. United as a cohesive team, we have diligently undertaken each task one by one, as the old saying goes, "Rome was not built in a day, but they were laying bricks every hour."

Finally, as the chairperson of this year's event, I would like to express my heartfelt gratitude to the sponsors, advisors, and committee members for their exceptional dedication and invaluable contributions, which have been instrumental in orchestrating this resounding success. Without their unwavering support, this event would not have been possible.

As we embark on this year's conference, let us embrace the spirit of collaboration, knowledge sharing, and boundless exploration. May this event bring you lots of value, guiding us toward discovering investment opportunities beyond turmoil!

**SUMMER CHUA**  
**Organizing Chairperson**

PhillipCapital 13<sup>th</sup> Investment Conference 2023



# FOREWORD BY BURSA MALAYSIA DERIVATIVES BERHAD



**DATUK MUHAMAD UMAR SWIFT**

Chairman Of

Bursa Malaysia Derivatives Berhad &

CEO Of Bursa Malaysia Berhad

Recovering from the COVID-19 pandemic, the global economy continues to grapple with uncertainties, due to geopolitical tensions, supply-chain disruptions, fluctuating financial markets with the banking crisis, and aggravated by fears of a possible recession. This prevailing sense of unease casts a shadow over industries worldwide, resulting in reduced consumer spending, and a cautious approach to expansion. Moreover, the downward trajectory of food and energy prices adds another layer of complexity. While lower prices might provide some relief to consumers and businesses in the short term, they also raise concerns about deflationary pressures, weakened economic growth, and potential job losses in industries connected to these sectors.

Against this backdrop, governments, businesses, and individuals are confronted with the challenge of navigating the uncertainties and adapting to an evolving global operating landscape. Investors need to take proactive measures for portfolio diversification and effective risk management, to navigate turbulent market conditions. In this regard, Bursa Malaysia Derivatives offers a range of exchange-traded derivatives products that are reliable for hedging risks.

Over the decades, Bursa Malaysia Derivatives continues to maintain its position as the global hub for palm oil price discovery. With the relatively volatile past year, our Crude Palm Oil Futures ("FCPO") contract concluded the year 2022 on a high note, achieving a record full-year trading volume of 16.2 million contracts, equivalent to 405 million metric tonnes of Crude Palm Oil ("CPO"), surpassing our performance in 2021 of 15.6 million contracts or 390 million metric tonnes of CPO. The FCPO trading volume in 2022 was more than five times the global production of CPO.

While we celebrate this remarkable achievement, Bursa Malaysia remains committed to serve market participants better, and will persistently pursue advancements to enrich our ecosystem and broaden our range of products. An important development worth mentioning is the enhancement last year of the Gold Futures contract (FGLD), quoted in US Dollars with settlement in Malaysian Ringgit. This improvement offers domestic investors the opportunity to participate in the global gold market while mitigating the impact of currency fluctuations. Additionally, in December 2022, Bursa Malaysia Derivatives launched the FTSE4Good Bursa Malaysia Index Futures contract (F4GM), catering to the rising demand for ESG investment products, allowing investors to align their investment goals with their ESG values.

Following positive response to our After-Hours (T+1) Trading session that took effect in December 2021, we further extended the T+1 trading hours to 2:30 a.m. for selected derivatives contracts, including the FGLD and F4GM contracts mentioned earlier. In 2022, during after-hours, a total of 1.49 million contracts were traded for the whole of 2022. This amounts to 8% of the total day and night trading volume. The After-Hours Trading continues to receive positive feedback this year, with 544,145 contracts traded in the first five months of 2023.

Our efforts have not gone unnoticed and have earned Bursa Malaysia Derivatives the honour of being recognized as "Exchange of the Year for Commodities" and "Exchange of the Year for Sustainability" at the Futures & Options World Asia Capital Markets Awards 2022.

We will continue to enhance our product development to meet and satisfy evolving investor needs. Toward this end, we are working towards launching currency futures, which would be the first listed currency futures contract in Malaysia. This expansion will provide a transparent and regulated marketplace for hedgers and traders, attracting even more liquidity into our market.

In developing the ecosystem and as the marketplace operator, we truly believe in the value of fostering conversations between industry professionals, fund houses, and business partners to share insights and learn from one another. Thus, Bursa Malaysia Derivatives is pleased to return as the Exchange Partner for the PhillipCapital 13th Annual Investment Conference 2023. We are confident that this conference will uphold its purpose of providing a valuable platform for participants to engage in fruitful discussions on opportunities and strategies that will contribute to the continued growth of the derivatives markets.

Thank you.



# GUEST OF HONOUR



**Mohd Saleem Kader Bakas**

Director  
Bursa Malaysia Derivatives Berhad

Mohd Saleem Kader Bakas is the Director of Bursa Malaysia Derivatives Berhad, a subsidiary of Bursa Malaysia Berhad that provides, operates, and maintains a futures and options exchange. He joined the Exchange in 2019 and has since spearheaded various projects in his earlier roles, leading and overseeing the Malaysian exchange-traded derivatives. In March 2023, Saleem was officially appointed as Director of Bursa Malaysia Derivatives Berhad, where he currently serves as a Principal Officer.

In addition to his role at Bursa Malaysia Derivatives Berhad, Saleem is also a member of the management committee of Bursa Malaysia Berhad. Saleem brings over 28 years of experience in the Futures industry, having previously worked at HSBC Singapore as the Director, Head of Futures. Since joining the Exchange, he has held various leadership roles, including Head of Product & Market Development and Head of International Development. Under his leadership, the Exchange has launched new products and implemented initiatives to expand, diversify, and improve the offerings to meet the needs of market participants. He has also played a significant role in engaging with industry stakeholders and establishing collaborations with foreign exchanges to explore new business opportunities.

# SPEAKER'S PROFILE



**Ang Kok Heng**

Chief Investment Officer  
Phillip Capital Management Sdn Bhd

## Dedollarisation-How Will It Impact The Future Investment Landscape?

Ang Kok Heng joined PhillipCapital Group in January 2007 as the Chief Investment Officer. He brings along with him more than 20 years of experience in equity research and investment having worked in TA securities as the head of research for 7 years and thereafter as the head of investment in TA Asset Management Sdn Bhd for another 12 years.

Ang has very extensive experience in the capital market in Malaysia and his views are well sought after by local and foreign journalists. He was an investment columnist for New Straits Times for three years and he also acted as the investment consultant for a medium size composite insurance company for several years. While in his previous employment, he led a team of fund managers to win several awards for the unit trust funds.

He graduated with a BE in Mechanical Engineering, from University of Malaya in 1980 and holds a Master Degree in Business Administration from Universiti Kebangsaan Malaysia. Ang holds a Capital Markets Services Representative License (CMSRL/A3984/2007) and a Chartered Financial Analyst (CFA) charterholder since 1997.



# SPEAKER'S PROFILE



**Michael Sim**

Director  
Synergy Link Capital Sdn Bhd

## Capturing Unique Emerging Market Opportunities With Bursa Malaysia Index Derivatives

Michael Sim joined Synergy in 2012 as Partner and Director. His career spans a vast period from the era of exchange floor trading to the electronic marketplace of today. With more than 20+ years under his belt and experience in both the Buy and Sell side of the business from his years with Merrill Lynch, Michael processes extensive knowledge of market microstructure across a broad spectrum of products with a specific focus on index valuation and spread trading.



**Tan Ming Han**

Head of Investments  
Eastspring Al-Wara' Investments Berhad

## Asia Poised To Drive Global Growth

Prior to joining Eastspring Al-Wara' Investments, Ming Han was Associate Director in Amundi Malaysia Sdn Bhd where he managed regional and domestic equity portfolios for institutional clients from June 2012 to Oct 2018. Ming Han has past investment experience in the industry including Meridian, HwangDBS Investment Management and Phillip Capital Management where he also managed both local and regional unit trust funds and discretionary mandates. He has long/ short equity experience from his working stint as a hedge fund manager in Singapore in 2010. He started his career in corporate finance and brings with him more than 18 years of investment industry experience.

Ming Han holds a Bachelor of Commerce degree majoring in Corporate Finance and International Business from the University of Adelaide, Australia.



**Christopher Kok Keng Fai**

Head of Equities, Investment  
Kenanga Investors Berhad

## Market Outlook for 2H'2023: Investing in Uncertain Times

Christopher joined Kenanga Investors Berhad in January 2014 as a Portfolio Manager, and currently has more than 14 years of experience in financial markets. His responsibilities include portfolio management, macro strategy, as well as research coverage on selected market & sectors.

Previously, he was with Meridian Asset Management where he was also involved in managing local and regional portfolios. He began his career with AmInvestment Bank in the Equity Capital Markets department where he worked on numerous deals including initial public offerings (IPOs), follow-on equity offerings, secondary placements and underwriting risk assessments.

He graduated from Monash University, Australia with a Bachelor of Commerce (Accounting & Finance). He is also a Chartered Financial Analyst (CFA) charter holder and a holder of a Capital Markets Services Representative's License.



# SPEAKER'S PROFILE



**Rachana Mehta**

Regional Co-Head of Fixed Income  
Maybank Asset Management Sdn Bhd

## Blessing In Disguise

Rachana, as the Regional Co-Head of Fixed Income, is responsible for all Asia local and hard currency fixed income investments, including Islamic Sukuk at Maybank Asset Management. She has over 25 years of experience managing Asian government and corporate bonds and foreign exchange. Rachana spent 9 years at Cargill Singapore where she was Head of Foreign Exchange and Interest Rates. Most recently, she was Head of Asia and Emerging Markets Fixed Income at DBS Asset Management.

Rachana graduated from Birla Institute of Technology and Science with a Masters in Management Studies (Finance). She holds an MBA (with distinction) from University of South Carolina, Columbia and is a CFA charterholder.



**Bruce Zhang  
(ZHANG DINGHAI)**

Portfolio Manager  
CSOP Asset Management Pte Ltd  
in partnership with  
AmFunds Management Berhad

## Can Tech Perform In Such Times Of Uncertainty?

Zhang Dinghai (Bruce) is responsible for bond investment strategies for fixed-income and equities investments. Prior to joining CSOP, Bruce worked at State Street Global Advisors and held several roles including product engineer, portfolio specialist, and portfolio manager. He was responsible for managing billions of dollars in fixed-income funds/ETFs across Asia local currency bonds, onshore China bonds, Asia credit, global treasury, and linkers in Singapore.

Bruce holds a Master's degree in Economics from the University of Hong Kong and a Bachelor of Arts from Peking University. He has been in the financial industry since 2008 and he is a CFA Charterholder.



**Ng Chze How**

Head, Retail Wealth Distribution  
Manulife Investment Management (M) Berhad

## Reset Or Revolution: Discovering Investment Opportunities In Indonesia, China & US

Based in Malaysia, Ng Chze How is the Head of Retail Wealth Distribution of Manulife Investment Management (M) Berhad.

Chze How has over 20 years of experience in the financial services industry, covering asset management, banking and life insurance sectors in Malaysia. He most recently served as the Chief Agency Officer in Northern Region of a multinational insurer in Malaysia. He also served as the Chief Executive and Director at the asset management arm of the insurer. Previously, Chze How held several senior leadership roles at leading multinational and local asset managers in Malaysia.

Chze How holds a Bachelor of Arts from University of Strathclyde, United Kingdom. He is a Capital Market Services Representative License holder and also a Certified Financial Planner.



# SPEAKER'S PROFILE



**Ten Chee Seong**

Director, Intermediary &  
Private Retirement Business  
AHAM Asset Management Berhad

## Navigating Global Equities: Opportunities And Challenges In A Dynamic Market

Ten is the Director, Intermediary and Private Retirement Business of AHAM Capital (Formerly known as "Affin Hwang Asset Management Berhad"). His current designation sees him actively involved in driving business expansion as well as managing relationships with the various distributors and business partners of the firm. He is also playing a key role in the strategic planning and development for the growth of AHAM Private Retirement Scheme (PRS) business.

Ten joined AHAM Capital in May 2010 where he was pivotal in building and driving the growth of the Personal Wealth Business team as well as the expansion of the firm's retail and mass affluent business segment.

Ten graduated with a Bachelor of Arts (Honours) degree in Business Administration from the University of Abertay Dundee, United Kingdom; and is also a Certified Financial Planner. Prior joining AHAM Capital, he began his career in consumer financial services in the banking sector.



**Woo Mun Thye**

Head, Investment Services  
Principal Asset Management Berhad

## Silver Linings – Be Nimble & Risk Aware

Mun Thye joined Principal Asset Management as Head of Investment Services in June 2018. He was previously the Head of Investment Management and Products with AmPrivate Banking. Mun Thye brings with him over 30 years of experience in the financial industry. Since 2000 he has served as a portfolio manager for both international and domestic equities. Prior to that Mun Thye was investment analyst having worked with a number of global investment banks.



**Tim Brown**

Senior Product Specialist  
Janus Henderson Investors  
RHB Asset Management Sdn Bhd

## Unleashing The Power Of Sustainable Future Technology

Tim Brown is a Senior Product Specialist at Janus Henderson Investors, responsible for sector and thematic equity products. Prior to joining the firm in 2018, he spent eight years at Vanguard Asset Management in several roles, most recently as a product specialist focused on active equity funds.

Tim earned a BSc degree (in business and finance) from Royal Holloway University of London. He holds the CFA Institute Certificate in ESG Investing and has 14 years of financial industry experience.



# SPEAKER'S PROFILE



**Dr. Tan Chong Koay**

Founder/ Chief Strategist &  
Executive Chairman  
Pheim Unit Trusts Bhd

## Rising Above Financial Storms Through Crisis

DR. TAN CHONG KOAY founded Pheim Asset Management Sdn Bhd, Malaysia and Pheim Asset Management (Asia) Pte Ltd, Singapore from 1994 and 1995 respectively.

He is a veteran fund manager in Asia with more than 46 years of investment experience, fine-tuning Value Investing alongside his innovative Investment Philosophy of "Never Fully Invest At All Times", which has successfully weathered through major crises and volatile ASIAN market, and substantially increased the wealth of clients in the long run.

Reputed for his acute sense of market timing and stock selection, Dr. Tan was labelled as the "King of the Second Board" in 1995/1996. He was named the "Southeast Asia's Small-Cap King" in a Bloomberg article in August 2006. In the World Wealth Creation Conference held in Singapore in 2017, Dr Tan was named "The Warren Buffett of Asia" for being truly enhancing Value Investing.

Dr Tan was also granted the "National Outstanding Entrepreneurs Lifetime Achievement Award" by the Kingsley Strategic Institute For Asia Pacific in March 2021, as well as the 2022 ASEAN Distinguished Entrepreneur Lifetime Achievement Award at the 2022 ASEAN Leadership and Partnership Forum in September 2022.



**Yvonne Tan Hong Yeap**

Head of Equities  
Eastspring Investments Berhad

## Malaysia - An Era Of New Opportunities In Challenging Time

Yvonne Tan Hong Yeap is with Eastspring Investments Berhad (EIMY) for 16 years. She is currently heading the equity team and overseeing all the equity funds in EIMY. Prior to that, she was heading the investment team (insurance), overseeing more than RM20billion funds.

Yvonne has 29 years of experience in the investment industry comprising 23 years in fund management and 6 years in investment research. Yvonne has experience in managing the domestic and Asia Pacific ex-Japan equities, as well as balanced funds.

Prior to joining EIMY, she was a Senior Investment Manager in a leading multinational insurance company, and she was also one of the pioneers of a local and Singapore-based asset management company.

Yvonne holds a BSc (First Honours) and she graduated from the Association of International Accountants (UK) in 1993. She is a CFA Charterholder since September 1998.



# SPEAKER'S PROFILE



**Louis Wong Wai Kit**  
Director  
Phillip Capital Management (HK) Ltd

## China SOEs—Is The Re-Rating Story Still Intact

Mr. Wong is the Director of Phillip Securities (HK) Limited and the Director of Phillip Capital Management (HK) Limited. He is one of the most experienced fund managers in Hong Kong. He has over 30-years of solid experience and track record in the financial market. His stock selection criteria is stringent, which insists on having a thoughtful understanding and sophisticated analysis of the company before making investment decision. He is now the host of certain financial programs of Hong Kong Cable Television, HK Metro Radio. He has been awarded by the Putonghua Channel of Radio Television Hong Kong as the best financial analyst for 3 years. In addition, He was the financial columnist for Hong Kong Economic Times, Oriental Daily, Ming Pao and Yahoo HK. Mr. Wong is the author of three popular investment guidebooks. He has also served as part-time instructor of several investment courses in various Hong Kong universities: City University of Hong Kong, Polytechnic University of Hong Kong and Lingnan University.



**Stephanie Lim**  
Senior Manager  
Product & Market Development,  
Bursa Malaysia Derivatives Berhad

## Unlocking Opportunities In The Gold Market With Bursa Malaysia Gold Futures (FGLD)

Stephanie is currently attached with the Commodity Derivatives Product Development Team at Bursa Malaysia Derivatives. She is responsible for improving and expanding the commodity product offerings of the Exchange. She graduated with a degree in Business Administration (Banking and Finance) and was a licensed Futures Broker's Representative and moved on to the Business Development Team with a regional investment bank for 10+ years before joining Bursa Malaysia Derivatives in July 2022.



**Joy-Marina Choong Wai Kwin**  
Head of Fixed Income, Investment  
Kenanga Investors Berhad

## Malaysia's Bond Market: A Less Bumpy Road Ahead

Joy-Marina joined Kenanga Investors Berhad in 2019, following the acquisition of Libra Invest Berhad by Kenanga Investors. Her responsibilities include managing fixed income funds and private fixed income client accounts.

She began her career as an executive trainee in a local financial institution, where she gained 12 years of working experience in the wholesale credit division, before joining Libra Invest as a fixed income fund manager in 2010.

She graduated from RMIT University, Australia with a Bachelor of Business (Economics and Finance).



# SPEAKER'S PROFILE



**Shan Kamahl Mohammad**

Chief Executive Officer  
MIDF Amanah Asset Management Berhad

## How Total Return Strategies Can Benefit Investors - A Fund Manager's Perspective

Shan was appointed as the CEO of MIDF Amanah Asset Management Berhad in October 2022, after initially joining MIDF Amanah Investment Bank Berhad as its Head of Equity Market (Dealing) in August of 2021.

He has over 20 years of experience in investment and asset management. He started his career in AON Services Group in the United States of America and subsequently joined Hong Leong Assurance Berhad.

He then spent over 16 years in ValueCAP Group (end-2002 to mid-2019) where he eventually led the team that managed the proprietary funds from 2002 to 2014. From mid-2014 to mid-2017, he was mandated by ValueCAP Group, as CEO/ED, to build a new licensed Fund Management Company (FMC) called VCAP Asset Managers Sdn Bhd that focused on providing active investment management capabilities that were integrated with an internal ESG framework. This FMC provided investment solutions by investing in ASEAN listed equities and fixed income securities. Its client base was largely state-owned institutions, GLICs, foundations and sophisticated investors in Malaysia.

Shan had been an Independent Investment Panel member of Urusharta Jamaah Sdn Bhd (2019-2020) and was an Independent Investment Committee member of Tenggara Capital Seed 1 LP (2021). Shan (and 2 other partners) had originated and managed a closed-ended Global Mixed Asset Fund with Fortress Capital Asset Management (M) Sdn Bhd in 2020.

Shan has a degree in Actuarial Science from the University of Hartford, USA and an MBA from Charles Stuart University, Australia (external via HELP University Malaysia).



**Ryan Long**

Head of Product & Market Development  
Bursa Malaysia Derivatives Berhad

## Forum Session: "Investment Opportunities Beyond Turmoil"

Ryan Long is the Head of Product & Market Development at Bursa Malaysia Derivatives. He is responsible for improving and expanding the product offerings of the Exchange. Ryan brings more than 20 years of experience in the derivatives market. Over the years, he had assumed different roles within the industry in Malaysia and Singapore, which include physical broking and trading, institutional futures dealing, commodity risk management, as well as proprietary trading prior to joining Bursa Malaysia Derivatives.



# SPEAKER'S PROFILE



**Tan Teck Leng**

Deputy Chief Investment Officer  
Phillip Capital Management(S) Ltd

## Forum Session: "Investment Opportunities Beyond Turmoil"

Tan Teck Leng is the Deputy Chief Investment Officer of Phillip Capital Management(S) Ltd, and a key member of the investment team covering global equity and fixed income markets, including both active funds and ETFs. He oversees the managed account portfolios and the management of the equity and balanced funds portfolios. Prior to joining the Group in 2008, he worked in the aerospace and defence fields with a Singapore-based engineering conglomerate, and also had project management experience in a regional construction and infrastructure engineering consultancy firm. Teck Leng obtained his Bachelor of Mechanical Engineering degree with First Class Honours from Imperial College London in 1999. Teck Leng is a CFA (Chartered Financial Analyst) charterholder.

# EMCEE & MODERATOR PROFILE



**Yoga Lim Yi Zhia**

Producer & Presenter @ BFM CaiJin,  
Sister Channel of BFM 89.9

Yoga is a business radio program host and producer of BFM CaiJin, a sister brand of BFM 89.9 radio, that specialises in podcasts & business and finance articles, visual business and economy content in Chinese language. She has over 6 years of experience in business & finance show production. She focuses on stock market analysis, personal investment & financial management and interviews with listed companies' management team.

Before joining BFM, she was the pioneer team member at CITYPlus FM 106, Malaysia's First Chinese Business Radio Broadcast Station. She also served as a member of a local fashion magazine's editorial team back in 2016.





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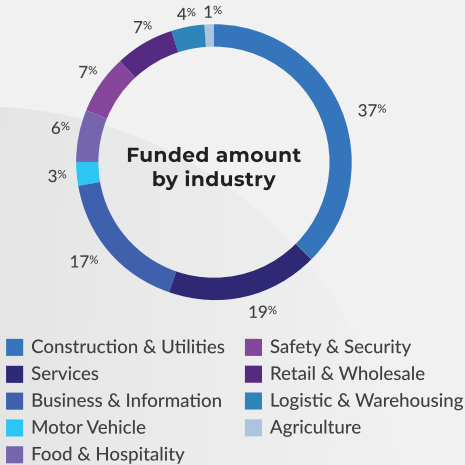
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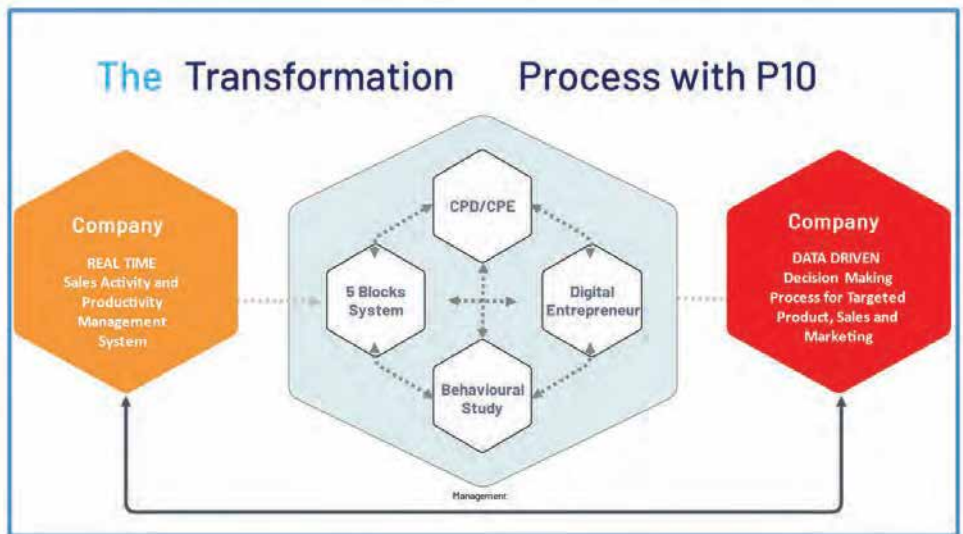
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# ORGANIZER



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# ORGANIZER

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Capital Market & Services License No: CMSL/A0233/2008

Phillip Capital Sdn Bhd (formerly known as Phillip Futures Sdn Bhd) was incorporated on 7th October 1995 and is a holder of a Capital Market Services License to carry out the regulated business of trading in derivatives and securities.

Phillip Capital Sdn Bhd is a Trading Participant of Bursa Malaysia Derivatives Berhad and Participating Organisation of Bursa Malaysia Securities Berhad. Initially started as a licensed futures broking company under PhillipCapital Malaysia, Phillip Capital Sdn Bhd is now an award-winning futures broking company that offers local and foreign specified exchanges in a single trading platform. In our ongoing business expansion, clients will be able to experience a comprehensive suite of product offerings including stocks and securities in addition to our existing derivatives products such as futures, options and CFDs. With over 30 years of derivatives broking experience, Phillip Capital Sdn Bhd strives to provide a more integrated and comprehensive range of quality services that will meet the changing needs of its clients.

## **Fame Platform Sdn Bhd**

Fame Platform Sdn Bhd (FAME) is a company providing IT outsourcing and business solutions services for the financial advisory industry. FAME was incorporated on 29th September 2010 and obtained MSC Status on 29th December 2010. The flagship of the Company is a multi-currency, multi-product, wealth management platform called FAME (Financial Access Made Easy). In Malaysia, FAME is among the first of independent Wealth Advisory Platforms catering to the financial advisory industry.

The latest version of the platform, FAME 3.0, provides 24-hour online access to a user friendly wealth management website with modular and flexible architecture. Using FAME, financial advisors and investors from all walks of life stay informed, manage their financial assets with ease, view and extract to various output formats portfolio reports and transaction details for various types of investments, ranging from unit trusts, managed accounts and insurance to offshore mutual funds, and share investments.

Financial advisors are able to access data and charts pertaining to sales performance, commissions and business reports, as well as CRM tools to deliver better and more effective services. With much more improvements in the works such as integration with other financial services and products as well as compatibility with mobile devices, FAME is determined to continuously expand to fit the needs of the marketplace in a timely and relevant manner.



# EXCHANGE PARTNER



## **Bursa Malaysia Derivatives Berhad**

Bursa Malaysia Derivatives Berhad is a wholly-owned subsidiary of Bursa Malaysia Berhad that provides, operates, and maintains a futures and options exchange. We offer a diverse range of commodity, equity, and financial derivatives products tradable globally via the CME GLOBEX® electronic trading platform. Notably, our flagship product, FCPO, is the world's most liquid crude palm oil futures contract, consolidating Malaysia's position as the global centre for palm oil price discovery.

The Exchange operates under the supervision of the Securities Commission and is governed by the Capital Markets and Services Act 2007. It also falls under the jurisdiction of the Ministry of Finance of Malaysia, offering investors the security of trading on a regulated Exchange with infrastructure and regulations on par with the standards of established markets worldwide.

Since 2009, our strategic partnership with Chicago Mercantile Exchange (CME) has enabled global accessibility to our derivatives offerings and continues to support the growth of our market today. Bursa Malaysia Derivatives' commitment to Creating Opportunities, Growing Value for our stakeholders and investors has been recognised by industry peers. Recent prestigious awards we have won include "Exchange of the Year – Commodities" and "Exchange of the Year – Sustainability" at the Futures & Options World (FOW) The Asia Capital Markets Awards 2022.



# PLATINUM SPONSOR



A Prudential plc company 

## Eastspring Investments Berhad

Eastspring Investments, part of Prudential plc, is a global asset manager with Asia at its core, offering innovative investment solutions to meet the financial needs of clients. At the heart of Eastspring is a strong connection with our shared purpose – **Experts in Asia. Invested in Your Future.** – and this clearly guides everything we do.

Since our founding in 1994, we have built an unparalleled on-the-ground presence in 11 key Asian markets<sup>1</sup> as well as distribution offices in North America and Europe. For institutional and retail clients globally, we manage a total of USD221.4 bn<sup>2</sup> across a broad range of strategies including equity, fixed income, multi asset, quantitative and alternatives.

### Experts in Asia

Our deep understanding of Asian markets, paired with our global perspectives, gives us unique insights to navigate complex markets

### 300+ investment experts<sup>3</sup>

Our team of highly experienced investment experts has a singular focus to potentially deliver superior long-term outcomes to clients

**In Malaysia,** Eastspring Investments Berhad is one of the largest asset management companies in both institutional and retail. The firm manages unit trust funds, wholesale funds as well as private mandates for individuals and institutions.

### RM57.6 bn in assets under management

As at 31 December 2022

### Industry recognition

Four fund awards at the Lipper Fund Awards from Refinitiv 2023<sup>4</sup>

For more information, please visit [eastspring.com/my](https://eastspring.com/my)

<sup>1</sup> Presence in China, Hong Kong, India, Indonesia, Japan, Malaysia, Singapore, South Korea, Taiwan, Thailand and Vietnam. <sup>2</sup> As at 31 December 2022. <sup>3</sup> Including Joint Ventures. <sup>4</sup> Announced on 14 March 2023. Past performance of funds/Eastspring Investments Berhad ("Eastspring") is not an indication of its future performance. The grantors of the awards are not related to Eastspring. Note: bn = billion.

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# PLATINUM SPONSOR

# Kenanga

## Kenanga Investors

### Kenanga Investors Berhad

Kenanga Investors Group consists of Kenanga Investors Berhad, Kenanga Islamic Investors Berhad and i-VCAP Management Sdn Bhd. As the asset and wealth management arm of Kenanga Investment Bank Berhad, we offer a range of investment solutions to meet the diverse needs of our clients that includes collective investment schemes, portfolio management services, segregated private mandates, and alternative investments. These services are designed to cater to the investment objectives and risk appetite of retail, corporate, institutional clients, and high net-worth individuals.

We take great pride in our consistent top performance and numerous awards in the industry.

At the **Refinitiv Lipper Fund Awards Malaysia 2023**, we were honored to receive the overall best Mixed Assets - Malaysia Pension Funds Group award for the fourth time. Additionally, individual fund wins were awarded to our Kenanga Malaysian In Fund for best Equity Malaysia Diversified - Malaysia Provident Funds over 10 Years, and our Kenanga Managed Growth Fund for best Mixed Asset MYR Flexible - Malaysia Provident Funds over 3, 5 and 10 Years. The Hong Kong-based **Asia Asset Management's 2023 Best of the Best Awards** also recognised us with multiple awards, including Malaysia Best Impact Investing Manager (2nd consecutive year), Malaysia Best Equity Manager (5th consecutive year), Malaysia CEO of the Year (4th Win), Malaysia Best House for Alternatives (4th consecutive year), and Malaysia Most Improved Fund House. Our "Highly Commended" ranking on the list of Top Investment Houses' in the **Asian Local Currency Bond Awards for Asset Managers** by The Asset Benchmark Research is another testament to our performance. Furthermore, the **FSMOne Recommended Unit Trusts Awards 2023/2024** named Kenanga Growth Fund Series 2 as "MYR Class Equity - Malaysia Focused", Kenanga Shariah Growth Opportunities Fund as "Equity - Malaysia Small to Mid-Cap (Islamic)" and Kenanga Shariah OneRS Growth Fund as "PRS - Growth (Islamic)".

In addition to delivering outperformance, we are committed to expanding our sustainability agenda and providing sustainable investment options for our clients. The launch of the Kenanga Sustainability Series, a suite of multi-asset class products rooted in sustainability considerations, aims to advance long-term financial growth for investors and generate social and financial value for surrounding communities. We have also been recognised for our sustainability efforts, receiving the "Sustainable Products" award at the **United Nations Global Compact Network Malaysia & Brunei Sustainability Performance Awards 2022**.

Our commitment to innovation, collaboration, digitalisation, and sustainability has earned us a reputation as a leading asset manager in Malaysia.



# GOLD SPONSOR



## **AHAM Asset Management Berhad**

AHAM Asset Management Berhad ("AHAM Capital") is an independently-managed, institutional-owned asset and wealth management firm. Established since 2001, we have been entrusted by our clients – including the likes of corporates, institutions, pension funds, government-linked companies, high net worth individuals, and the mass affluent – in building and managing investment portfolios that are nimble yet resilient over the long run.

We invest into an array of asset classes including equities, fixed income, money market instruments, structured products, and other alternative assets to deliver long-term sustainable value. By adopting a holistic and client centric approach, our wealth platform provides you with convenient access to regional and global solutions across varying strategies and instruments.

To better equip you in your financial journey, we provide comprehensive wealth solutions through our stable of unit trust funds, Shariah-compliant funds, cash management solutions, as well as bespoke wealth management offerings; such as private mandates and advisory, that can be tailored to meet specific objectives.

Our Shariah investment solutions are made available through our wholly owned subsidiary and Shariah investment arm, AIIMAN Asset Management Sdn Bhd ("AIIMAN").



# GOLD SPONSOR



## **AmFunds Management Berhad**

AmInvest is the brand name for the fund management business of AmFunds Management Berhad and AmIslamic Funds Management Sdn. Bhd. We are a multiple award-winning fund manager based in Malaysia with over 40 years of investing experience managing unit trust funds, wholesale funds, institutional mandates, Exchange-Traded Funds (ETF) and Private Retirement Schemes (PRS); encompassing both conventional and Shariah-compliant funds.



# GOLD SPONSOR



## Asset Management

### Maybank Asset Management Sdn Bhd

Maybank Asset Management Sdn Bhd ("MAM") is fully owned by Maybank Asset Management Group ("MAMG") and is headquartered in Kuala Lumpur.

We offer investment management solutions to institutional investors, high net worth individuals and the mass retail through our discretionary portfolio management services and managed funds.

Backed by one of the largest banks in the ASEAN region, we provide to our clients:

- On the ground investment expertise strategically located across the ASEAN region
- Strong regional investment capabilities, led by an experienced team of investment professionals with expertise in multi asset class investing
- Dedicated and proactive client services

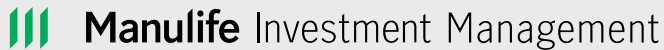
With over 30 years of experience, MAM manages investments ranging from equities, fixed income securities, money market instruments to unit trust funds and wholesale funds on behalf of corporations, institutions, insurance and takaful companies and individuals.

As at 31 May 2023, MAM manages close to RM 20 billion on behalf of individuals and corporations in Malaysia. MAM manages 44 conventional and Shariah compliant funds (of which 30 are unit trust funds and 14 are wholesale funds).

For further enquiries, please contact our Client Services at +603 2297 7888 or email us at [mamcs@maybank.com.my](mailto:mamcs@maybank.com.my) or visit [www.maybank-am.com.my](http://www.maybank-am.com.my)



# GOLD SPONSOR



## **Manulife Investment Management (M) Berhad**

### **Manulife Investment Management**

Manulife Investment Management is the global brand for the global wealth and asset management segment of Manulife Financial Corporation. We draw on more than a century of financial stewardship and the full resources of our parent company to serve individuals, institutions, and retirement plan members worldwide. Headquartered in Toronto, our extensive capabilities in public and private markets are strengthened by an investment footprint that spans 19 geographies. We complement these capabilities by providing access to a network of unaffiliated asset managers from around the world. We're committed to investing responsibly across our businesses. We develop innovative global frameworks for sustainable investing, collaboratively engage with companies in our securities portfolios, and maintain a high standard of stewardship where we own and operate assets, and we believe in supporting financial well-being through our workplace retirement plans. Today, plan sponsors around the world rely on our retirement plan administration and investment expertise to help their employees plan for, save for, and live a better retirement. Not all offerings are available in all jurisdictions. For additional information, please visit [manulifeim.com](https://manulifeim.com).

### **Manulife Investment Management (M) Berhad**

Manulife Investment Management (M) Berhad Registration No: 200801033087 (834424-U) ("Manulife IM (Malaysia)") is a wholly owned subsidiary of Manulife Holdings Berhad (listed on Bursa Malaysia), which is majority owned by Canada-based Manulife Financial Corporation. Manulife IM (Malaysia) offers a comprehensive range of more than 60 unit trust and PRS funds in the asset classes of equity, fixed income and money market. Since 2010, Manulife IM (Malaysia) has received 71 awards in total; with the eight (8) most significant house awards being won in 2023, 2017 & 2018, namely the Best Equity Fund Family Group Over Three Years, Malaysia, Best Bond Fund Family Group Over Three Years, Malaysia Provident Funds and Best Mixed Assets Fund Family Group Over Three Years, Malaysia Islamic Funds by Refinitiv Lipper Fund Awards Malaysia 2023, Best Mixed Assets Fund Family Group Over Three Years by Refinitiv Lipper Fund Awards Global Islamic 2023, Best Overall Award Malaysia Provident by The Edge | Thomson Reuters Lipper Fund Awards 2017, the Most Outstanding Islamic Asset Management Company by KLIFF Islamic Finance Awards 2017, Top Investment House Malaysia - Rank 5 in Asian Local Currency Bonds by The Asset Benchmark Research Awards 2017 and the Best Group Over 3 Years - Mixed Assets by Thomson Reuters Lipper Global Islamic Fund Award 2018. Visit us online at [manulifeim.com.my](https://manulifeim.com.my).

The awards herein are granted by Refinitiv Lipper, Thomson Reuters, Kuala Lumpur Islamic Finance Forum and The Asset with whom Manulife IM (Malaysia) is not related to.



# GOLD SPONSOR



## PHEIM Unit Trusts Berhad

**Capitalizing on the synergies among the Pheim Group of companies-** At Pheim, we are benefitting from the increased synergies that exceed among the Pheim affiliated entities, comprising of Pheim Asset Management Sdn Bhd, Pheim Asset Management (Asia) Pte Ltd, Pheim Unit Trusts Bhd, and Pheim Islamic Asset Management Sdn Bhd. These synergies that have been strengthening over time has worked and enhanced the Pheim franchise; broaden the product offerings available from the Pheim Group; and tapping into each other's market reach.

**Pheim Asset Management Sdn Bhd (Pheim Malaysia)**, a licensed asset management company founded by Dr. Tan Chong Koay, has been in operation since 4 January 1994. It was one of the pioneer boutique asset management companies when the asset management industry in Malaysia was first liberalised. As one of the maiden asset management companies in Malaysia, Pheim Malaysia is licenced under the Capital Markets and Services Act 2007, specializing in ASEAN and Asia ex-Japan equity markets. Our clientele consists of high-net worth individuals, a diverse group of corporate investors that include provident fund and insurance companies as well as retail investors. Pheim Malaysia has successfully established a long-term performance track record that extends to our Islamic funds. The Dana Makmur Pheim and Pheim Asia Ex-Japan Islamic Fund, launched in 2002 and 2006 respectively, have won numerous awards from rating agencies like Refinitiv Lipper and Asia Asset Management over the years.

In view of our track record, the Securities Commission Malaysia has granted a new Islamic Fund Management licence to **Pheim Islamic Asset Management Sdn Bhd (Pheim Islamic)**, another wholly-owned subsidiary company of Pheim Malaysia, on 4 October 2021. We are ready to tap into the growing demand for Islamic mandates and investment funds, and capitalise on investors' preference for Islamic or ethical products by offering a wide range of Islamic products to institutional and global investors, and at the same time, help in promoting the development of Malaysia's Islamic capital market. Pheim Islamic seeks to grow the Islamic fund management industry as an important channel for mobilising human capital as well as developing talent pool to be proficient in the area of Islamic-based investing. This is in-line with the goal of driving the next phase of internationalisation for Malaysia's Islamic markets given that Islamic wealth management industry has clearly been identified as having significant potential for growth. Pheim Islamic adds value through the nurturing of professionals and enhance the expertise in Islamic fund management, and promoting industry growth through greater investment in Islamic shares and debt securities.

**Pheim Unit Trusts Berhad (PUTB or the Manager)**, started its operation in April 2001, as a Unit Trust Management Company approved by the Securities Commission Malaysia, and is a wholly-owned subsidiary company of Pheim Malaysia. PUTB was formed to cater to the needs of retail investors, and to provide a platform for them to tap into the asset management expertise of Pheim Malaysia and Pheim Islamic. To date, PUTB has launched eight retail products, five of which are Islamic or Shariah-compliant funds. The funds are:

- Pheim Emerging Companies Balanced Fund (balanced fund)
- Dana Makmur Pheim (balanced fund – Islamic)
- Pheim Income Fund (income fund)
- Pheim Asia Ex-Japan Fund (equity fund)
- Pheim Asia Ex-Japan Islamic Fund (equity fund – Islamic)
- Pheim Greater China Islamic Fund (equity fund – Islamic)
- Pheim ASEAN Islamic Fund (equity fund – Islamic)
- Pheim Global ESG Islamic Fund (equity fund – Islamic)

Pheim Malaysia's affiliated company in Singapore, **Pheim Asset Management (Asia) Pte Ltd (Pheim Singapore)**, began operations as an Exempt Fund Manager in January 1995 and became one of the first two boutique fund managers in Singapore to be granted the Investment Adviser – Boutique Fund Manager Licence by the Monetary Authority of Singapore (MAS) in 1999. In March 2002, it went on to become the first boutique fund manager in Singapore to be granted a full Investment Adviser's ("IA") Licence [now known as Capital Markets Services (Fund Management) Licence].


At Pheim, we endeavour to provide the best services to you and we are committed in maximizing your investment returns while undertaking a reasonable level of risk.

At **Pheim**, we always believe, **Your Need is our Focus**.



# GOLD SPONSOR



In alliance with  **CIMB**

## Principal Asset Management Berhad

With over 143 years of global experience in investment, Principal Financial Group is serving 3,000,000+\* investors in Southeast Asia, providing innovative ideas and real-life solutions.

### We are Principal

Our customers have always been and will always be at the centre of everything that we do. We offer a wide variety of solutions to help people and companies in building, protecting and advancing their financial well-being. We are a joint venture between Principal Financial Group and CIMB Group. Our headquarters is in Malaysia with a footprint across Indonesia, Thailand and Singapore.

Shariah-compliant and conventional solutions for you:

Unit trust | Private Retirement Scheme

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\*As of April 2023



# GOLD SPONSOR



## **RHB Asset Management Sdn Bhd**

RHB Asset Management Sdn Bhd (RHBAM) is approved and licensed by the Securities Commission Malaysia (SC) under the Capital Markets and Services Act 2007 to carry out fund management activities, dealing in securities restricted to unit trusts products, dealing in private retirement scheme and investment advice. It is a wholly-owned subsidiary of RHB Investment Bank Berhad, which in turn is a wholly-owned subsidiary of RHB Bank Berhad, a licensed bank and listed on the Bursa Malaysia.

RHBAM offers investments in unit trusts, private retirement schemes, private mandates that invest in local, Asian and global markets, which asset classes include amongst others equity, bond/fixed income, mixed assets, money market or cash and funds of funds. The above investment products and services offerings cover both Shariah-compliant and conventional investments for retail individuals, corporations, institutions, government agencies and pension fund houses.

RHB Islamic International Asset Management Berhad (RHBIIAM) is a wholly-owned subsidiary of RHBAM and is a holder of a Capital Markets Services Licence to carry out Islamic fund management activities and dealing in securities restricted to unit trust products. RHBIIAM was incorporated on 17 November 2009 with a current authorized and paid-up capital of RM13 million. RHBIIAM's funds are also distributed by RHBAM.



# SILVER SPONSOR



## The Archipelago Group

The Archipelago Group is a multi-line Labuan Midshore underwriter offering life and general (re) insurance services for both Conventional and Takaful risks. The Archipelago Group is a Labuan Financial Services Authority (LFSA) registered and licensed insurance Group with its co-located office based in Kuala Lumpur. It operates within the Labuan International Business and Financial Centre (LIBFC) regulated framework and is a member of the Labuan International Insurance Association (LIIA). The Group provides a unique brand of bespoke and personalised insurance financial solutions to clients across Asia.

### Archipelago Life Insurance Limited

It designs unique protection for individual, family or group term life covers, short term endowment series, investment-linked policies (ILPs) and mini-Jumbos are on our expanded life product range. Life insurance has become a key component of wealth planning strategy for High Networth Individuals (HNWIs). It is a major investment for HNWIs and it is utilised to manage wealth such as the formation of a trust for wealth transfer to the next generation, estate planning, charitable giving and tax planning in a broader context. It also enables HNWIs to properly structure business and personal assets. A primary reason for HNWIs purchase life insurance is to finance costs associated with death without liquidating assets.



# SILVER SPONSOR



## BIMB Investment Management Berhad

BIMB Investment Management Berhad (“BIMB Investment”), a wholly owned subsidiary of Bank Islam Malaysia Berhad is a leading Shariah-ESG (Environmental, Social and Governance) investment management company, licensed and registered with the Securities Commission Malaysia. BIMB Investment was incorporated on 14 September 1993 and commenced its operations on 20 June 1994.

BIMB Investment has embraced financial technology (“FinTech”) through its partnership with Arabesque Asset Management UK in 2015, making full use of Artificial Intelligence (AI) and Big Data technology in the investment strategy and portfolio management to offer a transparent, superior-performing product with a focus on delivering sustainable risk-adjusted investment returns to individual and institutional investors.

BIMB Investment has a wide range of Shariah-ESG funds in Malaysia across multiple asset classes that includes Global Equities, Asia Pacific Equities, Malaysia Equities and Global ESG Sukuk. The company launched the first global Shariah-ESG equity fund in November 2015, the first of its kind in Malaysia\* that integrates ESG data with AI and Big Data technology investment strategy to generate financial outperformance. In 2018, BIMB Investment launched the World's First ESG Sukuk Fund, which is the largest Global Sukuk fund\*\* in Malaysia with a fund size of more than RM149 million. The first Robo-Intelligence Shariah-ESG investing digital platform, “BEST app” was introduced by the company on 26 March 2020 as part of its’ commitment to bringing sustainable investing to Malaysians from all walks of life. The company has also launched the First Wakaf Featured Unit Trust Fund-Makmur myWakaf Fund on 3 March 2021, under the Securities Commission Malaysia (SC) Waqf-Featured Fund Framework that was introduced on 12 November 2020 and a qualified Sustainable and Responsible Investment (SRI) Fund under the SC Guidelines on Sustainable and Responsible Investment Funds.

BIMB Investment is the first bank-backed Islamic Asset Manager in Malaysia and Southeast Asia to be a signatory of the United Nations-supported Principles for Responsible Investment (UNPRI). Through UNPRI, BIMB Investment is committed in incorporating ESG factors into investment decisions, to better manage risk and generate sustainable, long-term returns which ultimately will shape a sustainable future.

*\*Source: BIMB Investment Official Media Release dated 17 October 2019.*

*\*\*Source: Refinitiv Lipper IM data as at 28 April 2023.*

### Area of Services

- Shariah-ESG fund offerings across multiple asset classes;
- Artificial Intelligence and Big Data technology investment process;
- Digital Business Solutions; and
- Corporate, Institutional and Retail Business.

**Disclaimer:** In relation to any unit trust fund(s) offered by BIMB Investment Management Berhad (BIMB Investment) mentioned above, investors are advised to read and understand the contents of the Prospectus or its supplemental (if any), and the Product Highlights Sheet (PHS) before investing, which have been lodged with the Securities Commission Malaysia (SC) who takes no responsibility for its contents. A copy of the Prospectus or its supplemental (if any), and PHS can be obtained from the Head Office of BIMB Investment, [www.bimbinvestment.com.my](http://www.bimbinvestment.com.my), any of our authorised unit trust consultants, distributors and/or any Bank Islam branches. The SC's authorization or the lodgement of the Prospectus or its supplemental (if any), and PHS should not be taken to indicate that the SC has recommended the Fund. There are fees and charges involved and investors are advised to compare and consider the fees, charges and costs involved before investing in the Fund. Investments in the Fund are exposed to risk, please refer to the Prospectus or its supplemental (if any), and PHS for detailed information. Investors are advised to consider the risks in the Fund and should make their own risk assessment and seek professional advice, where necessary, prior to investing. Investors should also note that the price of units and distribution payables, if any, may fluctuate, and past performance of the Fund should not be taken as indicative of its future performance. Any issue of units to which the Prospectus or its supplemental (if any), and PHS relates will only be made upon receipt of the completed application form referred to in and accompanying the Prospectus or its supplemental (if any), and PHS, subject to the terms and conditions therein. Investors are also advised that, where distribution declared, investors are advised that following issue of distribution, the NAV per unit will be reduced from cum distribution to ex-distribution NAV. This material has not been reviewed by the SC.



# SILVER SPONSOR



## CapBay

CapBay is an award-winning Supply Chain Finance and Peer-to-Peer (P2P) Financing platform that helps SMEs grow and unlock cashflow trapped in their supply chain by providing financing solutions. Through our proprietary credit-decisioning model, businesses of all sizes can obtain financing while banks and investors can participate in high-quality financing deals.

Since 2017, CapBay Group has financed billions of Ringgit over tens of thousands of transactions, serving over thousands of SMEs. We have partnered several large corporates, banks and institutional investors to offer our award-winning solution.

In 2019, Capbay received the P2P financing license from Securities Commission Malaysia. Since then, CapBay P2P has financed over RM1 billion while maintaining the lowest default rates at <0.1% among Malaysia's major P2P players through our specialisation in financing suppliers to blue-chip companies and GLCs. Based on notes up to May 2023, CapBay P2P financing delivered average net returns of 8.2% .

CapBay is recognized as a leader in Supply Chain Finance winning many accolades and invited to speak at major international events. CapBay was the first Malaysian fintech to win "Fintech Startup of the Year" by The Asset Triple-A Digital Awards, a coveted banking industry award which recognises technological achievements spanning across APAC.



# SILVER SPONSOR



## Helicap

Helicap is a Singapore-based market network providing curated and exclusive private co-investments to a wide network of accredited investors. Our goal is to fill a \$500B financing gap for the underbanked by deploying capital through 1,000 originator partners in the region, with a strong financial inclusion mandate. Through our institutional-grade credit analytics technology, which churns and analyses millions of loan data points from origination platforms, we extract meaningful credit rating insights for our risk management framework. This is complemented by our fully online and MAS licensed investor deal platform, that provides co-investment opportunities to our exclusive investor base. Since Helicap's founding, and through COVID-19, we have disbursed more than \$180M in private investment volume with zero originator defaults. Our equity backers include Japanese financial services firm, Credit Saison alongside billion-dollar asset managers PhillipCapital and Tikehau Capital, top VC firms – East Ventures and Voveo Capital.

*\*Helicap Pte Ltd is not licensed in Malaysia and Helicap Income Opportunities Fund can only be accessed through Phillip Global Wrap Account that is offered by Phillip Capital Management Sdn Bhd*



# SILVER SPONSOR



## **PMB Investment Berhad**

PMB Investment Berhad (PMB Investment) is an Islamic Fund Management Company (IFMC), dedicated to provide sustainable returns from investment to meet the financial needs of our investors. Incorporated on 15th January 1993 as ASM MARA Unit Trust Management Berhad, PMB Investment is a wholly-owned subsidiary of Pelaburan MARA Berhad, one of the pioneers in the unit industry in Malaysia with more than five decades of experience. PMB Investment is licensed under the Capital Markets and Services Act, 2007 with current paid-up shares capital of RM15.0 million as at 31 December 2022.

Our vision is we want to be a leading and preferred Shariah-compliant fund manager in Malaysia. Besides we also would like to inculcate Malaysians to participate in the equity market through unit trust investments and educating them in savings and investments for the betterment of their future.

In addition to our agency forces, PMB Investment collaborate with selected Institutional Unit Trust Advisers (IUTAs) to distribute our unit trust funds. The funds offer investment in Shariah-compliant equity, mixed asset, sukuk and money market.

Currently, PMB Investment manage portfolio mandate for Corporate Clients and eighteen (18) unit trust funds with total asset under management of RM1.38 billion (as of 30 April 2023). The funds are opened to all Malaysians.

In the recent Refinitiv Lipper Fund Awards 2023, our funds, PMB Shariah Equity Fund won the Best Equity Malaysia Diversified (Provident) award in the three (3) years and five (5) years categories, while PMB Shariah Tactical won the Best Mixed Asset MYR Flexible (Islamic) award in the five (5) years category.

For more information, go to [www.pmbinvestment.com.my](http://www.pmbinvestment.com.my) and follow us on our official social media; Facebook, Instagram and TikTok.



# SILVER SPONSOR



## P10 Holdings Sdn Bhd

P10 Holdings Sdn Bhd provides Financial Technology (FinTech) and Insurance Technology (InsurTech) Solutions to the Banking, Financial Services and Insurance (**BFSI**) Industry. P10 is recognized as an Advanced Financial Navigation Application by Malaysian Financial Planning Council (**MFPC**).

P10 has successfully designed, developed and commercialized various enabler technologies to become a **leading FinTech and InsurTech player** in the region. Our "Financial Advisory Sales Tool (**F.A.S.T**)" is a Humanized Financial Intelligence that is

**"Like Talking to You"**. You will find it very interactive, intuitive and insightful with multi-dimensional visualizations.

In today's competitive business environment, it is a must to **reinvest and reinvent** in setting new standards and benchmarks to stay ahead. We confidently believe that P10 can be the best-fit solutions to accelerate your business growth. **P10 is to Make You a Financial Wizard at Your Fingertips!**

Embracing P10 enables you to close a deal in minutes and you will find P10 **"Easy for Customer, Fun for You and Smart on Hand"**.



# MEDIA PARTNER



## **CITYPlus**

CITYPlus is a Mandarin-based radio station that is more than just a radio station. CITYPlus has a proactive digital platform which is accessible 24/7 for people on the move. The station understands the daily challenges and bus lifestyle that surrounds the decision makers, managers, owners and executives. Hence, CITYPlus summarises interesting business and financial news in a succinct manner for its listeners. Topics such as stock watch, gig economy, women and youth entrepreneurship, financial management, home improvements, gadgets, and even, jazz music are tailored to suit the fast paced “urban warriors” on living in the city – anywhere in the world!

CITYPlus also offers a platform for business to gather and network during our forums and events. Our signature annual “CITYPlus Investment Forum” as well as our “CITYPlus Post-Budget Forum” provide an opportunity for our participants to interact with our keynote speakers, government officials and high net worth persons, thus expanding their value proposition to their respective sponsors and brands.



# MEDIA PARTNER



## **SmartInvestor**

SmartInvestor magazine, published by Inovatif Media Asia Sdn Bhd, was founded in 1995 and is available online and in print. Its goal is to inform, connect, advise, and promote businesses in Malaysia. It is a reputable source for your business news and the region's authority figure with subject matter specialists in the business, finance and investment industries.

SmartInvestor is the ideal platform to ensure that your company is constantly in front of CEOs, Senior Executives, SMEs, Entrepreneurs, and Decision-Makers because of its targeted B2B audience.

A vibrant daily news website, weekly e-newsletters, targeted social media campaigns, and an extensive events calendar all accompany our physical magazine.



**Start Today**  
**For A Better Tomorrow**

[www.phillipinvest.com.my](http://www.phillipinvest.com.my)

Gain access to in-depth analysis and daily information about global markets or publicly traded companies.



**Phillip**  
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