

# AGENDA

## Mercer Global Investment Forums

Braving the Elements: Surfing the Late Cycle

TOKYO | Tuesday 16 April 2019

### Monday 15 April, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
15:45–16:30	Asset Manager Session Registration	
16:30–18:30	Asset Manager Session	
18:30–20:30	Welcome Reception (All delegates)	

### Tuesday 16 April, 2019

TIME	SESSION/SPEAKER(S)	LOCATION
07:45–08:45	Breakfast	
08:50–09:10	<b>Welcome and Opening</b> Masaaki Sakakibara, Wealth Business Country Leader, Japan	
09:10–09:50	<b>2019 Investment Themes, Reference Portfolios and Practical Application</b> Deb Clarke, Global Head of Investment Research Nick White, Global Strategic Research Director Toshio Imai, Investment Consulting Leader, Japan Cameron Systemans, Senior Portfolio Manager	
09:50–10:05	<b>Game of Later Life – Round 1</b> Suzutaro Kuroyanagi, Head of Alternative Investments, Japan	
10:05–10:35	Networking and Coffee Break	
10:35–10:40	MC Yuka Akiwa, Senior Investment Consultant	

10:40–11:40	<b>Keynote Address</b> TBD
11:40–12:05	<b>Investing in a Time of Climate Change – Ramifications for Portfolios</b> <b>Helga Birgden</b> , Global Business Leader, Responsible Investment <b>Makoto Hoshino</b> , Senior Investment Consultant
12:05–12:15	<b>Game of Later Life – Round 2</b> <b>Suzutaro Kuroyanagi</b> , Head of Alternative Investments, Japan
12:15–13:30	<b>Lunch</b>
13:30–14:00	<b>The Changing Industry Landscape – Surveying the Impacts</b>  <b>Facilitator:</b> <b>Yasutaka Takeuchi</b> , Senior Investment Consultant  <b>Panelists:</b> TBD
14:00–14:10	<b>The ‘Rise of China’ and What It Means for Your Asset Allocation</b> <b>Yuka Akiwa</b> , Senior Investment Consultant
14:10–14:30	<b>DB Pension Plans – Exposing the Myths and Looking Ahead</b> <b>Tomoya Goto</b> , Head of Wealth Consulting, Japan
14:30–14:40	<b>Late Cycle Opportunities for Defensive Portfolios</b> <b>Janet Li</b> , Wealth Business Leader, Asia
14:40–15:10	<b>Networking and Coffee Break</b>
15:10–15:20	<b>Game of Life – Round 3</b> <b>Suzutaro Kuroyanagi</b> , Head of Alternative Investments, Japan
15:20–15:40	<b>Investment Governance: Different Approaches to Working with Fiduciaries</b> <b>Fiona Dunsire</b> , UK CEO and Wealth Leader, Growth Markets
15:40–16:30	<b>An ‘Alternative’ Showdown</b> <b>Host:</b> <b>Simon Coxeter</b> , Asset Class Specialist, Equity Boutique  <ol style="list-style-type: none"><li>1. <b>Alternative Fixed Income</b> <b>Jean de Kock</b>, Asset Class Specialist, Fixed Income Boutique</li><li>2. <b>Private Equity</b> <b>Valerie Wong</b>, Asset Class Specialist, Mercer Private Markets</li><li>3. <b>Real Assets</b> <b>Henry Ching</b>, Asset Class Specialist, Real Estate Boutique</li><li>4. <b>Liquid Alternatives</b> <b>John Jackson</b>, Global Leader, Hedge Fund Boutique</li></ol>

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16:30–16:45	<b>Bringing it Altogether – Practical Application</b> Keisuke Okuda, CEO Mercer Investments, Japan
16:45–16:55	<b>Game of Later life – Round 4</b> Suzutaro Kuroyanagi, Head of Alternative Investments, Japan
<b>16:55–17:00</b>	<b>Closing Remarks</b> Renee McGowan, CEO, Asia