

# Post consensus

Asia | 21-22 April | Tokyo

## Tuesday 21 April

Time	Session/speakers
14:00–17:00	<b>Asset Manager Briefing</b>
17:00–19:00	<b>Welcome reception and networking</b> All attendees

## Wednesday 22 April

Time	Session/speaker(s)
8:00–9:00	<b>Welcome desk and breakfast</b>
9:00–9:15	<b>Our day ahead — Setting the stage for a post-consensus journey</b> Mick Dempsey, President, Investments and Retirement
9:15–9:45	<b>Post consensus — Navigating beyond traditional views</b> Adeline Tan, Head of Investments, Asia Nick White, Global Strategic Research Director
9:45–10:15	<b>Changing inputs, changing outcomes — Rethinking global risks and geopolitics</b> Garvan McCarthy, Chief Investment Officer, EMEA and Asia Ben Simpfendorfer, APAC Head, Oliver Wyman Forum
10:15–10:45	<b>Coffee break and networking</b>
10:45–11:30	<b>Changing assumptions — The asset owner perspective in an evolving investment landscape</b> Akihiro Konishi, CIO, Federation of National Public Service Personnel Mutual Aid Associations Kyoungtaek Lee, Deputy CIO, Korea Investment Corporation Niall O'Sullivan, Global Investment Solutions Chief Investment Officer
11:30–12:00	<b>Japan's changing regime — Inflation, rates, and strategic shifts (in Japanese)</b> Toshio Imai, Head of Investment Advisory, Japan

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	Cameron Systemans, Head of Multi-asset, Asia	
12:00–13:15	<b>Lunch</b>	
13:15–13:35	<b>Beyond beta — Resilience and adaptability from hedge funds</b> Dave McMillan, Global CIO, Hedge Funds	
13:35–13:45	<b>Beyond liquidity — Accessing private markets</b> Chason Beggerow, Global Leader, Co-Investments	
13:45–14:25	<b>Alternative attitudes — Revisiting the role of private investments under the new regime in Japan (in Japanese)</b> Keiichi Abe, Executive Managing Director, Deputy Head of Fund Management Division, Daiwa Asset Management Miho Hosoya, Senior Investment Consultant Naoyuki Igarashi, Senior General Manager, Head of Alternative Investment Dept., Japan Post Insurance	
14:25–14:50	<b>Coffee break</b>	
	<b>Mainstage topics in Japanese</b>	<b>Breakout topics in English</b>
14:50–15:20	<b>Evolving approach to home bias — Implications for asset owners in Japan</b> Rie Kishida, Senior Investment Consultant Masafumi Takechi, Senior Investment Consultant	<b>Evolving governance — Demystifying the total portfolio approach</b> Andrew McDougall, Global Head of Multi-asset Divyaa Mohan, Senior Manager – Portfolio Management Solutions, Asia
15:30–16:00	<b>Evolving currency allocation — Navigating the new JPY regime</b> Lintao Ye, Associate Portfolio Manager	<b>Evolving implementation — How derivatives can amplify returns and cushion risk</b> Sasha Mandich, Wealth Commercial Leader, South East Asia Kerrin Rosenberg, Global Head of Direct Investing
16:10–16:40	<b>Pushing boundaries — AI and the future of work (in Japanese)</b> Neo Morohashi, Head of Organization Transformation Excellence Unit, Career Consulting Service	
16:40–17:25	<b>Keynote conversation: Breaking barriers, raising the bar — Leadership and cultural evolution (in Japanese)</b> Michael Leitch, Japanese Rugby Legend Shiro Tsubota, Wealth Business Leader, Japan	
17:25	<b>Close</b> Shiro Tsubota, Wealth Business Leader, Japan	
17:30–19:00	<b>Closing reception</b>	