



CFA Society  
Japan

# JAPAN INVESTMENT CONFERENCE 2024

Unlocking the Potential of AI  
- AIの可能性を解き放つ -

## Overview

2024年5月23日（木） | 東京コンベンションホール  
Thursday May 23 | Tokyo Convention Hall

日本CFA協会主催 Hosted by CFA Society Japan



## Speakers



**Kenny Lam**  
CEO, Two Sigma Asia Pacific



**Evy Wee**  
Managing Director, DBS Bank



**Charlotte Wood**  
Head of Innovation, Fintech and AI Strategy at Schroders



**Jean Schmitt**  
President & Managing Partner, Jolt Capital



**Professor. Kiyoshi Izumi** Graduate School, The University of Tokyo



**Brenda Hou, CFA** Head, Global Partnerships & Client Solutions, Growth Markets, CFA Institute



**Yasuko Hio, CMA, PhD** General Manager of Investment Technology Department, Mizuho-DL Financial Technology



**Hiroyuki Shiratori** Director, Financial Services Department, PwC Consulting



**Osamu Hasegawa, CFA** Head of MIS Data Management Dept., Daiwa Securities



**Keisuke Uemura, CFA** Senior Portfolio Manager, Nomura Asset Management



**Masashi Tsujinaka** CEO, Nowcast Inc.



**Takuro Higashide** CIO, au Asset Management



**Yusuke Tomishima, CFA** Data Scientist, Tokio Marine Holdings



**Shohei Iwaya** Fund Manager, Investment Division, Asset Management One

## AGENDA (SUBJECT TO CHANGE)

Simultaneous interpretation (program subject to change)

Opening Remarks	
Keynote Speech	
Speech	(Temporary title) AI transforms the future of the asset management industry Kenny Lam (CEO, Two Sigma Asia Pacific)
Roll-out of AI in marketing function	
Speech	(Temporary title) New development in digital marketing powered by AI by financial institutions Evy Wee (Managing Director, Head of Regional Financial Planning & Advisory Solutions, Consumer Banking Group, DBS Bank)
Panel I	The Past, Present, and Future of AI Utilization in Sales & Marketing and Customer Relationship Management Moderator: Yoshimasa Satoh, CFA (IG Securities), Panelist: Osamu Hasegawa, CFA (Daiwa Securities), Miyazawa (LY Corporation), Yoshiki Sano (PKSHA Technology)
Networking	
Speech	(Temporary title) New development in alternative data (including unstructured data), data science, and AI in business Gary Kazantsev (Bloomberg)
Roll-out of AI in middle and back office function	
Speech	(Temporary title) Application of AI to operations in the Management division (e.g., portfolio and compliance) Hiroyuki Shiratori (Director, Financial Services Department, PwC Consulting LLC.)
Speech	Gold sponsor (Speech1) TBD (S&P Dow Jones Indices)
Networking	
Networking Lunch (exhibition by sponsor companies)	
Speech	Gold sponsor (Speech 2) Lucas Lepak (VP, Principal Product Manager, AI & ML, FactSet)
Roll-out of AI in front office function I	
Speech	(Temporary title) How to apply AI to ESG and SDGs investing Yasuko Hio, Ph.D (General Manager, Investment Technology Development Dept., Mizuho-DL Financial Technology Co., Ltd.)
Panel II	How to apply AI to ESG and SDGs data Moderator: Satoru Ikeda, CFA (Nikko Asset Management), Panelist: Professor. Kiyoshi Izumi (Graduate School, University of Tokyo), Yuusuke Tomishima, CFA (Tokio Marine Holdings), Keisuke Uemura, CFA (Nomura Asset Management)
Speech	Gold sponsor (Speech3) TBD (Morning Star Japan)
Networking	
Networking Coffee Break (exhibition by sponsor companies)	
Roll-out of AI in front office function II	
Speech	(Temporary title) (Temporary title) AI Application Case Studies Dr. Xuchun Li (Head of AI Development Office, Monetary Authority of Singapore)
Speech	How to turn private equity firms into AI based learning organizations-the example of Jolt Ninja AI Jean Schmitt (President & Managing Partner, Jolt Capital)
Speech	Introduction to CFA Institute Data Science for Investment Professionals Certificate Brenda Hou, CFA, CGMA, GAICD (Head, Global Partnerships & Client Solutions, Growth Markets, CFA Institute)
Networking	
Networking Coffee Break (exhibition by sponsor companies)	
Roll-out of AI in front office function III	
Speech	(Temporary title) Progress of digitalization in the asset management sector Charlotte Wood (Head of Innovation and Fintech Alliances, Schroders)
Panel III	Human vs AI: The Future of Fund Management Moderator: Michinori Kanokogi, CFA (Nissei Asset Management), Panelist: Takuo Higashide (au Asset Management), Shohei Iwaya (Asset Management One), Masashi Tsujinaka (Nowcast)
Closing Remarks	
Networking	
Networking Reception	

## CONFERENCE DETAIL

Theme	Unlocking the potential of AI-	
Date	Thursday, May 23, 2024	
Time	9:30 (Reception starts at 9:00) ~ 18:00 (followed by Reception until 20:00)	
	Tokyo Convention Hall (I <a href="http://tokyo.conventionhall.jp/access.html">http://tokyo.conventionhall.jp/access.html</a> )	
Venue	Tokyo Square Garden 5F, 1-1 Kyobashi 3 chome, Chuo-Ku Tokyo 104-0031 Japan	
Price	CFA Society Japan Members (Regular, Professional, Affiliate, Associate)	EB* JPY 6,000 (JPY10,000)
	CFA Institute Members (Other Society Members)	EB* JPY 6,000 (JPY 10,000)
	CFA Institute Members (Non-CFA Society Members/CFA Candidates)	EB* JPY 10,000 (JPY 15,000)
	CFA Candidates	EB* JPY 10,000 (JPY 15,000)
	Members of Supporting Organizations	EB* JPY 10,000 (JPY 15,000)
	Public	EB* JPY 20,000 (JPY 25,000)
Target Audience	Chief executive officers (CEOs), chief investment officers (CIOs), directors, people in planning departments, investment-related departments, and other AI-related departments in the financial industry. People in ESG-related departments at general business companies. People involved in AI-related regulations at government and other public offices. People on the side of asset owners, such as public and private pension funds.	
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\* EB: Early Bird Early-Bird Registration will close on May 7 or as soon as the number of registrants reaches the capacity. (Price after May 8 in parenthesis)

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