

Simultaneous interpretation (program subject to change)

| Session | Time | Lecture |
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| Opening | 9:30 9:40 | Opening Remarks Brenda Hou, CFA, CGMA, GAICD (Head, Global Partnerships & Client Solutions, Growth Markets, CFA Institute) |
| Keynote Speech | 9:40 10:00 | 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 | 10:00 10:25 | 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) |
| | 10:25 11:15 | Panel I The Past, Present, and Future of AI Utilization in Sales & Marketing and Customer Relationship Management Moderator: Yoshimasa Satoh, CFA (Head of Business Operations at IG Securities Limited in Japan), Panelist: Osamu Hasegawa, CFA (Head of MIS Data Management Dept., Daiwa Securities Co. Ltd.) Gen Miyazawa (Senior General Manager, Generative AI Group, Executive Corporate Officer, LY Corporation), Yoshiki Sano (Partner of Financial/Security domain, AI Solution Business Division, PKSHA Technology Inc. and Representative Director, AlgoNaut, Inc.) |
| Networking | 11:15 11:35 | Break Networking/Coffee break (exhibition by sponsor companies) |
| Speech | 11:35 12:00 | Speech (Temporary title) Alternative data (including unstructured data), data science, new developments in NLP analysis, etc. Gary Kazantsev (Bloomberg) |
| Roll-out of AI in middle and back office function | 12:00 12:25 | 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.) |
| Sponsor Presentation | 12:25 12:40 | Speech Gold sponsor (Speech1) TBD (S&P Dow Jones Indices) |
| Networking | 12:40 13:40 | Lunch Networking lunch/Speech 2 |
| Sponsor Presentation | 13:40 13:55 | Speech Gold sponsor (Speech2) Lucas Lepak (VP, Principal Product Manager, AI & ML, FactSet) |
| Roll-out of AI in front office function I | 13:55 14:20 | 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.) |
| | 14:20 15:10 | Panel II How to apply AI to ESG and SDGs data Moderator: Satoru Ikeda, CFA (Senior Fund Manager, Investment Technology Fund Management Department, Nikko Asset Management Co., Ltd.), Panelist: Professor Kiyoshi Izumi (Graduate School, The University of Tokyo), Yuusuke Tomishima, CFA (Data Scientist, Manager, Financial Planning Department at Tokio Marine Holdings, Inc.), Keisuke Uemura, CFA (Senior Portfolio Manager, Namura Asset Management) |
| Sponsor Presentation | 15:10 15:25 | Speech Gold sponsor (Speech3) TBD (Morning Star Japan) |
| Networking | 15:25 15:40 | Break Networking/Coffee break (exhibition by sponsor companies) |
| Roll-out of AI in front office function II | 15:40 16:05 | Speech (Temporary title) AI Application Case Studies Dr. Xuchun Li (Head of AI Development Office, Monetary Authority of Singapore) |
| | 16:05 16:30 | Speech III How to turn private equity firms into AI based learning organizations-the example of Jolt Ninja AI Jean Schmitt (President & Managing Partner, Jolt Capital) |
| CFA Institute Presentation | 16:30 16:50 | 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 | 16:50 17:00 | Break Networking/Coffee break (exhibition by sponsor companies) |
| Roll-out of AI in front office function III | 17:00 17:25 | Speech (Temporary title) Progress of digitalization in the asset management sector Charlotte Wood (Head of Innovation and Fintech Alliances, Schroders) |
| | 17:25 18:15 | Panel Human vs AI: The Future of Fund Management Moderator: Michinori Kanokogi, CFA (Nissei Asset Management), Panelist: Takuo Higashide (CIO, au Asset Management), Shohei Iwaya (Fund Manager, Investment Management Division, Asset Management One), Masashi Tsujinaka (CEO, Nowcast) |
| Closing | 18:15 18:20 | Closing Masato Degawa, CFA, President (CFA Society Japan) |
| Networking | 18:20 20:30 | Networking Reception |