



JAPAN INVESTMENT CONFERENCE 2026

**「Moving Forward to a Global Assets Management Power II:
Diversification and Beyond: New Frontiers in Asset Management」**

Overview

2026年5月27日（水） | 東京コンベンションホール

Wednesday May 27 Tokyo Convention Hall

OVERVIEW

The Japan Investment Conference (JIC) is the flagship event of the CFA Society Japan, annually addressing critical and timely themes for the asset management industry. It is the Society's largest conference in terms of both attendance and operational scale. Each year, we welcome speakers from regulatory authorities, practitioners, and experts, both domestically and internationally, to discuss challenges in investment management. This year's topic is ***Moving Forward to a Global Assets Management Power II: Diversification and Beyond: New Frontiers in Asset Management***. As Japan strives to become a Leading Asset Management Center, discussions will focus on the challenges and prospects for strengthening asset management power, particularly enhancing the capabilities of domestic capital markets and domestic asset managers, exploring these themes across three asset classes: fixed income, equities, and alternative investments.

The topic of the previous conference, JIC2025 ***Moving Forward to a Global Asset Management Power I***, attracted the highest number of participants to date, underscoring the continued attention to asset management in our country. While the shift from deposits to investments is steadily gaining traction thanks to government initiatives, revitalizing domestic capital markets and further enhancing asset management capabilities are essential not only to increase national wealth but also to develop Japan's asset management industry. In particular, strengthening the capabilities of domestic asset management companies is imperative. Despite being a long-standing challenge, prospects for significant progress remain limited.

At JIC2026, we will delve into the challenges and outlook for each asset class—traditional assets such as bonds and equities, and alternative investments—hoping to find clues to resolving longstanding issues. Regarding fixed income, as monetary policy begins its path toward normalization and we return to a world of interest rates, we will examine future market trends and new investment strategies. We will also discuss the challenges facing the Japanese bond market and potential solutions in the unusual supply-and-demand environment created by the Bank of Japan's massive bond holdings. For the equity market, we examine the current state and challenges of investment entities and strategies amid its ongoing upward trend since emerging from deflation. Against the backdrop of the Tokyo Stock Exchange's initiatives to raise management mindful of capital costs and stock prices, engagement is gaining attention as a key to enhancing corporate value. We delve into the current state and challenges of engagement in equity investing. Regarding alternative investments, while once targeted solely at institutional investors, they are now expanding into the individual investor market. However, the majority are investment products originated overseas. We will explore whether there is a viable path for alternative investments managed by domestic asset managers. We will also examine the current state, challenges, and outlook for new alternative investments (frontier investments).

Theme	Moving Forward to a Global Assets Management Power II: Diversification and Beyond: New Frontiers in Asset Management-	
Date	Wednesday, May 27, 2026	
Time	9:30 (Reception starts at 9:00) ~ 18:30 (followed by until 20:00)	
Venue	Tokyo Convention Hall (http://tokyo.conventionhall.jp/access.html) 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 investment management-related departments in the financial industry. People in ESG-related departments at general business companies. People involved in investment management-related regulations at government and other public offices. People on the side of asset owners, such as public and private pension funds.	
Contact	CFA Society Japan Otemachi Financial City South Tower 5F	
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* EB: Early Bird Early-Bird Registration will close on **May 6** or as soon as the number of registrants reaches the capacity. (Price after **May 7** in parenthesis)

Program (subject to change)

Language: Japanese/English (Simultaneous Interpretation available)

Simultaneous interpretation (program subject to change)

Session	Time		Lecture	
Opening	9:20	9:30	Opening Remarks Brenda Hou, CFA, CGMA, GAICD (Senior Head, APAC, Global Partnerships & Client Solutions, CFA Institute)	
Part I: Prospects for the Bond Market's Revival as Monetary Policy Normalization Unfolds				
	9:30	10:00	Speech	Transition Finance: Global Trends and the Investment Landscape in Japan (Tentative) David von Eiff (Director, Global Industry Standards, CFA Institute)
	10:00	10:30	Speech	Yen-Denominated Bonds: Investment Opportunities for Foreign Investors (Tentative) TBC (Asset Management One)
Sponsor Presentation I				
	10:30	10:45	Speech	
Networking	10:45	11:00	Break	Networking Coffee Break (Sponsor Exhibit)
	11:00	11:55	Panel I	Panelist : Life Insurance Company, Asset Management Company, Michio Saito (Nomura Institute of Capital Markets Research) Moderator : Nana Otsuki (Pictet Japan)
Sponsor Presentation I				
	11:55	12:10	Speech	
	12:10	12:35	Speech	
Networking	12:35	13:25	Lunch	Networking Lunch (Sponsor Exhibit)
Keynote Speech				
	13:25	13:45	Speech	
Sponsor Presentation II				
	13:45	14:00	Speech	
	14:00	14:15	Speech	
Part II: Practices and Challenges of Engagement in Equity Investment				
	14:15	14:45	Speech	Challenges and Outlook for Investor Engagement (Tentative) Annalisa Barrett, Senior Advisor, Board (Leadership Center, KPMG LLP)
	14:45	15:15	Speech	Challenges and Outlook for Investor Engagement (Tentative) Jemy Rosenwald III, CFA (Dalton Investment)
	15:15	16:10	Panel II	The Impact of Investor Engagement on Investment Performance: Challenges and Outlook (Tentative) Panelist: Zuhir Khan, CFA (UBP Investments), James Halse, CFA (Senjin Capital), Moderator: Tract Gopal, CFA (Third Allow)
Sponsor Presentation III				
	16:10	16:25	Speech	
	16:25	16:40	Speech	
Networking	16:40	16:55	Break	Networking Coffee Break (Sponsor Exhibit)
Part III: The Current Status, Challenges, and Outlook for Frontier Alternative Investment Management in Japan				
	16:55	17:25	Speech	(Brookfield) TBC
	17:25	17:55	Speech	
	17:55	18:30	Panel III	Private Asset Management Company in Japan
Closing	18:30	18:35	Closing Remarks Masato Degawa, CFA, (President, CFA Society Japan)	
Networking	18:35	20:30	Reception	Networking Reception

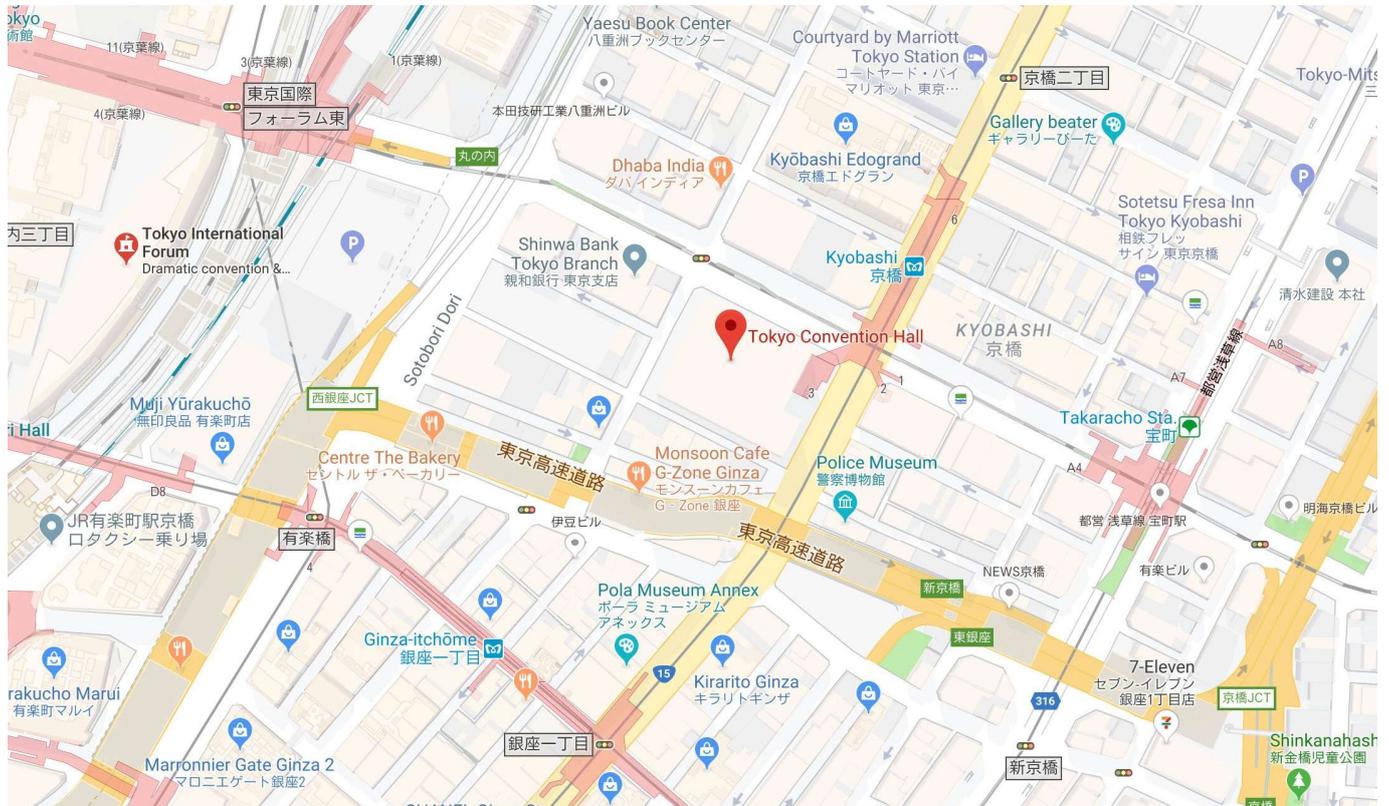
Access

Tokyo Convention Hall

TokyoSquareGarden5F, 1-1Kyobashi3chome, Chuo-KuTokyo104-0031Japan

TEL:03-5542-1995 FAX : 03-5542-1994

<http://tokyo.conventionhall.jp/access.html>



- Five Minute walk from JR Tokyo Station
- Two Minute walk from Tokyo Metro Yurakucho Line Ginza Ichome Station
- Directly connected to Tokyo Metro Ginza Line Kyobashi Station
- Six Minute walk from JR Yurakucho Station
- Two Minute walk from Toei Subway Line Takaracho Station

JIC data: Attendee's Profile, Number of Attendees and Evaluation

Past Topics of Japan Investment Conferences hosted by CFA Society Japan

Year	Topics	# of Participants	Online/In-Person
2016	将来に向けてのチャレンジ/Challenge for the future		In-Person
2017	社会のメガトレンドと20年後の資産運用サービス -資産運用会社がなすべきことは何か?-		In-Person
2018	インベストメント・チェーンにおけるアセット・オーナー2.0 - 低金利化の運用環境における新たな運用対象・リスクへの備え -	290	In-Person
2019	The Multi-Stage and The Challenges Facing Financial Services -人生100年時代に求められる金融サービス-	270	In-Person
2020	Women in Investment Management		Online
2021	Building Better Finance for Better Society		Online
2022	Gearing Up Sustainable Finance	230	In-Person
2024	Unlocking the potential of AI - AIの可能性を解き放つ -	294	In-Person
2025	Moving Forward to a Global Asset Management Power : 資産運用立国の実現に向けて	360	In-Person

(注) Japan Investment Conference 2025は16回目

Japan Investment Conference 2025 Executive Summary

- The number of attendees reached a record high of 360.
- As in previous years, the top attendees were asset management companies and financial services-related consulting firms, but this year saw an increase in asset owners such as public pension funds. There were also many attendees from asset management companies' executive positions.
- Although the number of questions per session decreased from 9 last year to 5, many questions demonstrated strong interest in the sessions. Creating an environment conducive to asking questions and providing pre-session guidance to speakers for Q&A sessions remain challenges.
- The conference was rated as "Very Useful" by approximately 64% of attendees (63% for content and 62% for speakers).
- While 50% rated the appropriateness of topics as "Excellent," 32% rated the length of sessions as "Excellent," leaving room for improvement.
- The appropriateness of the venue was rated Excellent by 59%, while networking coffee breaks, lunches, and receptions were rated Excellent by 48%, 50%, and 54%, respectively, achieving passing grades but with room for improvement.
- In individual session evaluations, the overall rating was 2.50 out of 3 points, indicating a high level of satisfaction.

Japan Investment Conference 2024/2025 Attendee Numbers and Profiles

JIC2024		JIC2025	
Asset Owner	8	Asset Owner/Pension	23
Bank	10	Bank	11
Consulting	64	Consulting	88
Corporate	17	Corporate	20
Insurance	13	Insurance	11
Investment Bank/Broker	19	Investment Bank/Broker	21
Investment Manager	66	Investment Manager	94
Media	11	Media	14
Miscellaneous Financial Services	20	Miscellaneous Financial Services	21
Regulator	13	Regulator	14
University	22	University/Academia	20
CFAI/CFAJ	8	CFAI/CFAJ	8
Other	23	Other	15
Total	294		360

Japan Investment Conference 2025 Overall Conference Evaluation

	Very Useful	Useful	Not Useful	
カンファレンス全体の評価 Please rate the conference OVERALL	64%	36%	0%	1
内容に対する評価 Please rate the conference CONTENT	63%	37%	0%	
講演者に対する評価 Please rate the conference SPEAKERS	62%	38%	0%	
	Excellent	Good	Satisfactory	Poor
トピックの適切性 Relevance of topics	50%	48%	2%	0%
時間帯 Timing of the day	40%	47%	13%	0%
時間の長さ Total length of time	32%	44%	20%	3%
	Excellent	Good	Satisfactory	Poor
会場/Venue	59%	38%	3%	0%
ネットワーキングコーヒーブレイク/Networking Coffee Break	48%	41%	9%	1%
ネットワーキングランチ/Networking Lunch	50%	37%	12%	1%
ネットワーキングレセプション/Networking Reception	54%	38%	6%	2%

You can view scenes from the Japan Investment Conference 2025 (seminar venues, sponsor exhibition areas, networking events, etc.) via the link below. <https://goodway.co.jp/fip/htdocs/josz8po6h-3636/>

