



PUTTING INVESTORS FIRST

RETHINKING FINANCIAL SERVICES FOR MILLENNIALS

OVERVIEW

Putting Investors First is a global CFA Institute initiative and part of the **Future of Finance** program. CFA Societies around the world organise Putting Investors First events to raise awareness and build support for aligning the interests of investors and their customers in a way that fosters trust and improves outcomes for investors.

For this year's annual event, we are focusing on challenges faced by the financial services industry in serving millennials. Nearly 30% percent of India's population was born between 1980 and 2000. Compared to earlier generations, millennials save, borrow and invest in ways that differ significantly from older consumers. We will explore the nature of challenges facing the industry in serving millennials, and how companies, policy makers and regulators are responding to these challenges.

The event is jointly hosted by the Institute of Chartered Accountants of India (ICAI), National Securities Depository Limited (NSDL), and CFA Society India.

EVENT DETAILS

Register at <http://cfa.is/PIF2017>.

Date: Friday, 21 April 2017

Time: 5:30 to 9:00 p.m.

Venue: ICAI Auditorium, Ground Floor, ICAI Tower, Opp. MCA Academy, Bandra Kurla Complex, Mumbai



AGENDA

COFFEE AND REGISTRATION (5:30–6:00 p.m.)

TIME

6:00–6:45 p.m.
(45 mins)

INAUGURAL SESSION

Opening and Welcome

Vote of Thanks

SPEAKERS

- **Samar Banwat**, Executive Vice President, NSDL
- **CA Prafulla P. Chhajed**, Member, Central Council, ICAI; Chairman, Banking, Financial Services and Insurance Committee
- **Jayesh Gandhi, CFA**, President, CFA Society India
- **CA Vishnu Agarwal**, Chairman, WIRC, ICAI

TECHNICAL SESSION

6:45–7:45 p.m.
(1 hour)

Panel I: Mind of the Millennial

- **Sachin Kalbag**, Resident Editor, Mumbai, The Hindu
- **Mandar Mhatre**, Entrepreneur and Investor
- **Talvinder Singh**, Product Head, Flagship, OYO Rooms
- **Sameer Somal**, Chief Financial Officer, Blue Ocean Global Technology
- **Ravi Subramanian**, Executive Director, Sriram City Union Finance; Author, *If God Was A Banker*
- **Moderator: Sonia Gandhi, CFA**, Director, CFA Society India

7:45–8:45 p.m.
(1 hour)

Panel II: Millennials and Financial Services

- **Partha Iyengar**, Co-Founder and Managing Partner, Life & Money
- **Amit Kumar**, Partner and Director, The Boston Consulting Group
- **Navneet Munot, CFA**, Chief Investment Officer, SBI Mutual Fund
- **Kalpen Parekh**, Joint President, DSP BlackRock AMC
- **Rajiv Sabharwal**, Partner, True North
- **Moderator: Uday Dhoot, CFA**, Founder, oyepaisa.com
- **Vidhu Shekhar, CFA**, Country Head, India, CFA Institute

Vote of Thanks

DINNER AND NETWORKING (9:00–10:00 p.m.)

Please note that agenda is subject to change without prior notice.