

June 7-8: LIVE in Singapore &
Webinar Access

June 9: Webinar Access only

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YEARS
IN SINGAPORE

Time/Date (SGT)	Tuesday, June 7, 2022
8:55-9:00	<p>Opening Remarks *</p> <p>Mr. Rig Karkhanis, Global Head of FX and Emerging Markets & Deputy Head of Global Markets, Head of Global Markets, AEJ, Nomura</p>
9:00-10:20	<p>The Global Economic Outlook: Hardening Policy Trade-Offs</p> <p><i>Moderator:</i> Mr. Rob Subbaraman, Head of Global Macro Research & Co-Head of GM Research, Nomura</p> <p><i>Speakers:</i> Dr. George Buckley, Chief European Economist, Nomura Mr. Robert Dent, US Economist, Nomura Dr. Ting Lu, Chief China Economist, Nomura Mr. Takashi Miwa, Chief Japan Economist, Nomura Ms. Sonal Varma, Chief Economist, India and Asia ex-Japan, Nomura</p>
10:30 - 11:50	<p>Asian Equity Markets Outlook *</p> <p><i>Moderator:</i> Mr. Jim McCafferty, Joint-Head of APAC Equity Research, Nomura</p> <p><i>Speakers:</i> Mr. CW Chung, Head of Research, Korea and Pan-Asia Tech / Semiconductors Research, Nomura Mr. Yunosuke Ikeda, Chief Equity Strategist & Head of Macro Strategy Japan, Nomura Mr. Saion Mukherjee, Head of India Equity Research, Nomura Mr. Chetan Seth, Equity Strategist, Nomura</p>
12:00 - 13:20	<p>Keynote: Mapping Risks in the Post-Covid World from Geopolitics to Inflation *</p> <p><i>Speaker:</i> Mr. Richard Koo, Chief Economist, Nomura Research Institute</p>
14:00 - 14:50	<p>2H 2022 Asia Credit Outlook *</p> <p><i>Moderator:</i> Mr. Nicholas Yap, Head of Asia ex-Japan Flow Credit Desk Analysts</p> <p><i>Speakers:</i> Mr. Dhiraj Bajaj, Head of Asia Fixed Income, Lombard Odier Mr. Rob Subbaraman, Head of Global Macro Research & Co-Head of GM Research, Nomura Mr. Andy Suen, Portfolio Manager and Head of Asia ex-Japan Credit Research, PineBridge Investments Mr. Timothy Tay, Head of APAC Credit, Chief Investment Office, UBS Global Wealth Management Mr. Frank Zheng, Portfolio Manager, Head of Overseas Fixed Income Investment, China Asset Management</p>
15:00 - 15:50	<p>Nomura's Top FX and Rates views *</p> <p><i>Speakers:</i> Mr. Craig Chan, Head of Global FX Strategy, Nomura Mr. Yujiro Goto, Head of FX Strategy Japan, Nomura Mr. Albert Leung, Head of Asia ex-Japan Rates Strategy, Global Markets Research Mr. Jordan Rochester, FX Strategist in the G10 Currency Strategy, Nomura</p>
16:00 - 16:50	<p>Keynote: India - Policy Priorities Amid Global Turbulence</p> <p><i>Moderator:</i> Ms. Sonal Varma, Chief Economist, India and Asia ex-Japan, Nomura</p> <p><i>Speaker:</i> Dr. T. V. Somanathan, Finance Secretary of India</p>
17:00 - 17:50	<p>The Geopolitics of Ukraine *</p> <p><i>Moderator:</i> Dr. Ting Lu, Chief China Economist, Nomura</p> <p><i>Speaker:</i> Prof. John Mearsheimer, R. Wendell Harrison Distinguished Service Professor in the Political Science Department, The University of Chicago</p>

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Time/Date (SGT)	Wednesday, June 8, 2022
8:55-9:00	<p>Welcome Remarks *</p> <p>Mr. Yutaka Nakajima, Head of Global Markets, Nomura</p>
09:00 - 09:50	<p>Keynote: Outlook for the Fed's Normalization and the Global Financial Environment *</p> <p>Moderator: Mr. Robert Dent, US Economist, Nomura</p> <p>Speaker: Dr. Richard Clarida, 21st Vice Chair of the Federal Reserve</p>
10:10 - 10:50	<p>Keynote: Containing Inflation Risks in a Transition Year</p> <p>Moderator: Mr. Euben Paracuelles, Chief ASEAN Economist, Nomura</p> <p>Speaker: Dr. Benjamin Diokno, Governor, Bangko Sentral ng Pilipinas (BSP)</p>
11:00 - 11:50	<p>China's Economic and Equity Market Outlook</p> <p>Speakers: Dr. Ting Gao, Head of Research and Chief of Strategy, Nomura Orient International Securities Dr. Ting Lu, Chief China Economist, Nomura</p>
12:00 - 13:00	<p>Keynote: Singapore's Vision on Building a Competent Workforce *</p> <p>Moderator: Mr. Euben Paracuelles, Chief ASEAN Economist, Nomura</p> <p>Speaker: Dr. Tan See Leng, Minister for Manpower, Government of Singapore</p>
13:00 - 13:50	<p>Japan's New Capitalism: From Slogan to Substance *</p> <p>Moderator: Mr. Jim McCafferty, Joint-Head of APAC Equity Research, Nomura</p> <p>Speaker: Dr. Nancy Snow, Fulbright scholar alumnus to Germany and Japan; Pax Mundi ("Distinguished") Professor of Public Diplomacy, Kyoto University of Foreign Studies (2016-2022); 2022-2023 Distinguished Visiting Professor and Advisor, Schwarzman Scholars, Tsinghua University</p>
14:00 - 14:50	<p>The Global EV Landscape: Future of Autonomous Driving *</p> <p>Moderator: Mr. David Wong, Co-Head of APAC Technology Research, Nomura</p> <p>Speakers: Mr. Tu Le, Founder and Managing Director, Sino Auto Insights Mr. Masataka Kunugimoto, Joint Head of APAC Equity Research, Nomura Mr. Benjamin Lo, Head of Hong Kong Research & China Autos Research, Nomura</p>
15:00 - 15:50	<p>Into the Metaverse with Ledger *</p> <p>Moderator: Mr. Olivier Dang, COO, Wholesale Digital Office, Nomura</p> <p>Speaker: Mr. Pascal Gauthier, CEO, Ledger</p>
16:00 - 16:50	<p>An APAC Vision - Upstream & Downstream Technology *</p> <p>Moderator: Mr. David Wong, Co-Head of APAC Technology Research, Nomura</p> <p>Speakers: Mr. CW Chung, Head of Research, Korea and Pan-Asia Tech / Semiconductors Research, Nomura Mr. Bing Duan, Analyst, China Telecom and Technology Research, Nomura Mr. Aaron Jeng, Head of Taiwan Research & Technology - Semiconductors Research, Nomura Ms. Anne Lee, Analyst, Technology – Handset, EMS, Camera, and Components Research, Nomura Mr. Donnie Teng, Analyst, Greater China Semiconductor & Technology Research, Nomura</p>
17:00 - 17:50	<p>Nomura Equity Research: Our ESG Findings *</p> <p>Moderator: Mr. Jim McCafferty, Joint-Head of APAC Equity Research, Nomura</p> <p>Speakers: Mr. Tushar Mohata, Head of Malaysia Equity Research, Nomura Mr. Saion Mukherjee, Head of India Equity Research, Nomura</p>
18:00 - 19:30	<p>Cocktail Reception</p> <p>The Ritz-Carlton, Millenia Singapore Grand Ballroom Foyer (Level 1)</p>

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Time/Date (SGT)	Thursday, June 9, 2022
09:00 - 09:50	<p>Fireside Chat: The EM Reversal Problem: Development Going Backwards</p> <p><i>Moderator:</i> Mr. Rob Subbaraman, Head of Global Macro Research & Co-Head of GM Research, Nomura</p> <p><i>Speaker:</i> Dr. Carmen M. Reinhart, Vice President & Chief Economist, World Bank</p>
10:00 - 10:50	<p>Cross-Asset Strategy: As the Cycle Turns *</p> <p><i>Speaker:</i> Mr. Charlie Mcelligott, Cross-asset Macro Strategist, Americas, Nomura</p>
11:00 - 11:50	<p>Biotech and the Future of US-China Relations: Risks and Opportunities *</p> <p><i>Moderator:</i> Mr. Jialin Zhang, Head of China Healthcare Research, Nomura</p> <p><i>Speaker:</i> Dr. Scott Moore, Director of China Programs and Strategic Initiatives, University of Pennsylvania</p>
12:00 - 12:50	<p>Keynote: The Chinese economy in 2022: Challenges and Policy Solutions</p> <p><i>Moderator:</i> Dr. Ting Lu, Chief China Economist, Nomura</p> <p><i>Speaker:</i> Mr. Baoliang Zhu, Chief Economist, China's State Information Center</p>
13:00 - 13:50	<p>Sustainability in the Energy Sector and ESG Investment Opportunities *</p> <p><i>Moderator:</i> Mr. Donnie Teng, Analyst, Greater China Semiconductor & Technology Research, Nomura</p> <p><i>Speakers:</i> Mr. Genyu Liu, Executive Director and CEO, China Nuclear Energy Technology Corporation Limited Ms. Cynthia Zhang, Founding Partner of FutureX Capital and Former Managing Director of China AMC Capital Management Company</p>
14:00 - 14:50	<p>Display market: Key Technology Trend and Outlook Ahead *</p> <p><i>Moderator:</i> Mr. Joel Ying, Analyst, China Telecom and Technology Research, Nomura</p> <p><i>Speaker:</i> Mr. Calvin Lee, CEO, Display Supply Chain consultants (DSCC) Korea</p>
15:00 - 15:50	<p>India Macro & Markets Outlook *</p> <p><i>Speakers:</i> Mr. Saion Mukherjee, Head of Equity Research, India, Nomura Mr. Nathan Sribalasundaram, Southeast Asia and India Rates Strategist Ms. Sonal Varma, Chief Economist, India and Asia ex-Japan, Nomura</p>
16:00 - 16:30	<p>ESG in Korea: The "S" Factor *</p> <p><i>Moderators:</i> Mr. Andrew Bowley, Wholesale Governance Officer, Nomura Mr. Jim McCafferty, Joint-Head of APAC Equity Research, Nomura</p> <p><i>Speaker:</i> Dr. Peter Matanle, School of East Asian Studies, Senior Lecturer in Japanese Studies, University of Sheffield</p>
16:30 - 17:20	<p>ESG Data: What It Does or Doesn't Tell You *</p> <p><i>Moderator:</i> Ms. Xylona Lam, ESG Equity Sales Specialist, Nomura</p> <p><i>Speaker:</i> Ms. Elsa Pau, Founder and CEO, BlueOnion</p>
17:30 - 18:20	<p>Token Economies in the Balance *</p> <p><i>Moderator:</i> Mr. Mark Cheng, Founding Partner of GameFi Ventures & Senior Advisor to Animoca Brands</p> <p><i>Speakers:</i> Mr. Sebastien Borget, Co-Founder and COO, Sandbox Ms. Beryl Li, Co-Founder, Yield Guild Games (YGG) Mr. Jeff Zirlin, Co-Founder & Growth Lead, Sky Mavis</p>

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