



CFA Society  
India

# **9TH INDIA INVESTMENT CONFERENCE**

## **SPONSORSHIP OPPORTUNITIES**

Friday, 11 January 2019 | Taj Lands End, Mumbai  
Hosted with CFA® Institute

# OVERVIEW

The 9th India Investment Conference provides a unique opportunity for delegates to improve their understanding of key issues that will drive investment decision-making in the coming months. Hosted jointly by CFA Society India and CFA Institute, the conference is a must-attend event for investment professionals.

In 2018, nearly 500 professionals including chief investment officers, strategists, research analysts, portfolio managers, corporate financial analysts, investment banking analysts, brokers, risk managers, consultants, traders, financial advisers, and wealth managers attended to learn from our prestigious local and international speakers.

To secure any of these opportunities and gain access to investment professionals attending the India Investment Conference, please contact:

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## ABOUT CFA INSTITUTE

CFA Institute is the global association of investment professionals that sets the standard for professional excellence and credentials. The organisation is a champion of ethical behaviour in investment markets and a respected source of knowledge in the global financial community. Our aim is to create an environment where investors' interests come first, markets function at their best, and economies grow. There are more than 161,000 CFA charterholders worldwide in 163 countries and regions.

We are driven by the belief that lasting economic growth depends on trust, competence, and transparency in financial markets, and we know that it must be led by professionals who are ethically centered and professionally trained. In short, we are here to lead, support, and connect all who want to create a better investment profession.

We offer a world-class suite of educational offerings to employers, students, working professionals, and regulators who are shaping the future of finance. Through our formal educational programs, professional development courses, and global network of university partners, we aim to deepen financial expertise for the benefit of investors worldwide.

### Top employers of CFA Institute members globally:

- Bank of America Merrill Lynch
- BlackRock
- Citigroup
- Credit Suisse
- HSBC
- JPMorgan Chase
- Morgan Stanley
- Royal Bank of Canada
- UBS
- Wells Fargo

## ABOUT CFA SOCIETY INDIA\*

CFA Society India (Indian Association of Investment Professionals), established in April 2005, is an association of local investment professionals, consisting of portfolio managers, security analysts, investment advisers, and other financial professionals. As one of the over 150 CFA Institute member societies, CFA Society India connects local members to a global network of investment professionals. The key objectives of CFA Society India are to promote ethical and professional standards within the investment industry in India and to facilitate the exchange of information and opinions among people within the local investment community and beyond. CFA Society India also works to further the public's understanding of the CFA designation and the investment industry.

\* CFA Society India is a registered trademark of CFA Institute licensed to be used by the Indian Association of Investment Professionals.

### Top employers of CFA charterholders in India:

- Ambit Group
- Citigroup
- CRISIL
- Deutsche Bank
- Goldman Sachs
- HSBC
- ICICI Group
- JP Morgan Chase
- MSCI Barra
- State Bank of India

# DISTINGUISHED SPEAKERS IN PAST CONFERENCES



**Peter Berezin**  
Chief Strategist  
BCA Research



**Rupal Bhansali**  
Chief Investment Officer,  
International and Global Equities  
Portfolio Manager  
Ariel Investments



**Heather Brilliant, CFA**  
Managing Director, Americas  
First State Investments



**Robert P. Browne, CFA**  
Executive VP and Chief  
Investment Officer  
Northern Trust



**Ashvin B. Chhabra**  
President  
Euclidean Capital



**Aswath Damodaran**  
Professor of Finance  
Leonard N. Stern School of  
Business  
New York University



**Anil Gaba**  
Professor of Decision Sciences  
and the Orpar Chaired Professor  
of Risk Management  
INSEAD



**Carla Harris**  
Vice Chairman, Managing  
Director, Senior Client Advisor  
Morgan Stanley



**Richard Koo**  
Chief Economist  
Nomura Research Institute



**Dr. Vikram Kuriyan, CFA**  
Director, Investment Lab  
Indian School of Business



**Aaron Low, CFA**  
Principal  
Lumen Advisor



**Philippa Malmgren**  
President and founder,  
DRPM Group  
Co-Founder, H Robotics



**Russell Napier, ASIP**  
Independent Strategist and  
Co-Founder  
Electronic Research  
Interchange (ERIC)



**Arvind Panagariya**  
Professor of Economics  
Jagdish Bhagwati Professor  
of Indian Political Economy,  
Columbia University



**Manoj Pradhan**  
Founder  
Talking Heads Macro



**Sunil Singhania, CFA**  
Founder, Abakus Asset  
Manager LLP



**Jonathan B. Stein, CFA**  
Chief Executive Officer and  
Founder  
Betterment



**Roger Urwin**  
Global Head of Investment  
Content  
Willis Towers Watson



**Andy Xie**  
Independent Economist



**Charles J. Yang, CFA**  
Managing Director  
Tokio Marine Asset  
Management

# PROGRAM DEMOGRAPHICS

Investment professionals attend the India Investment Conference to network with peers; attend educational sessions led by respected industry experts; and learn about new resources, products, and services that are available to assist their performance in their profession.

Our conference delegates are chief investment officers, research analysts, portfolio managers, corporate financial analysts, strategists, investment banking analysts, brokers, traders, risk managers, consultants, and financial advisers who have worked in the investment industry (mostly equities) for more than 10 years. Firms represented include wealth managers, financial advisers, family offices, trust companies, and others involved in the management of private wealth.

The demographic profile reflects data from the 8th India Investment Conference in Mumbai, India.

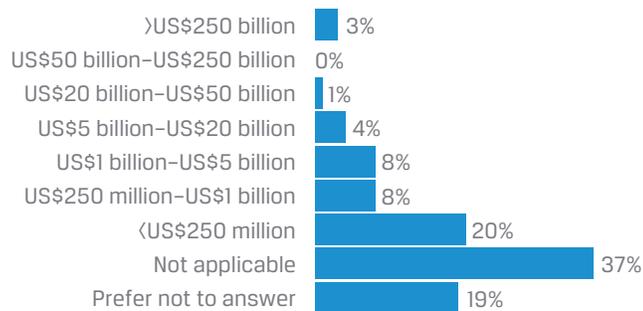
## 480+

Delegate Attendance

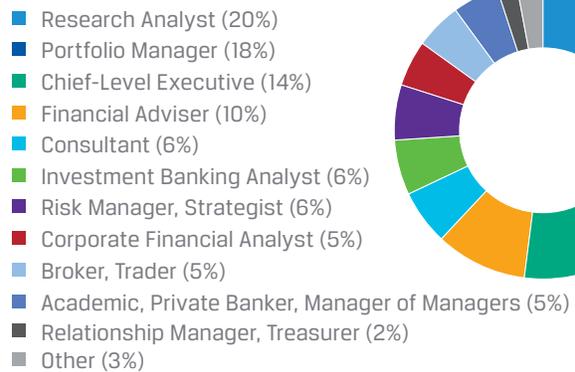
### CFA Institute Membership Status



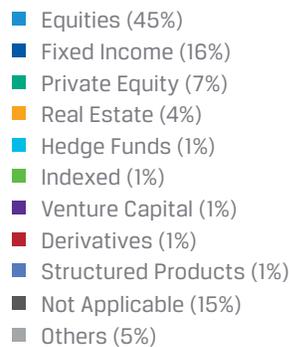
### Employer AUM (US\$)



### Delegate Occupation



### Primary Investment Practice



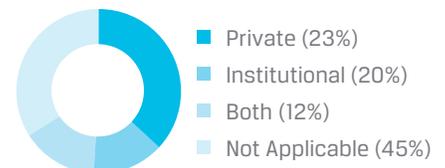
### Region



### Buy Side/Sell Side



### Primary Asset Base



# SPONSORSHIP AND EXHIBIT PROGRAMS

## PLATINUM SPONSOR

**7 Lakhs\*** | 1 Working Staff Pass  
9 Complimentary Delegate Passes

The Platinum Sponsor delivers the highest level of recognition throughout the marketing campaign and during the live event. Your firm will be announced, recognised, and thanked during the conference by a conference chairman. The Platinum Sponsor will be afforded significant brand exposure such as exposure on delegate badges, event directional signage, and conference backdrops to visibly align their firm's support with the mission and values of CFA Institute. An exhibit space in a premium location is included. The Platinum Sponsor also receives a one-time use of the post-event physical mailing list and opt-in email list of attendees. Advertisements and e-blasts will explicitly recognise your firm as the Platinum Sponsor, providing maximum visibility and interaction with conference attendees.

## GOLD SPONSOR

**5 Lakhs\*** | 1 Working Staff Pass  
6 Complimentary Delegate Passes

The Gold Sponsor delivers significant recognition prior to the conference as well as during the live event. The Gold Sponsor will receive branding on event directional signage, the conference backdrop, tent cards, and housekeeping slides. Three ads in the CFA Institute *Financial NewsBrief* are included for promoting your firm's logo and message. An exhibit table in a premium location is also included.

## SILVER SPONSOR

**3 Lakhs\*** | 1 Working Staff Pass  
4 Complimentary Delegate Passes

The Silver Sponsor delivers recognition prior to the conference as well as during the live event. The Silver Sponsor will receive branding on event directional signage, tent cards, and housekeeping slides. An exhibit table is also included with the Silver Sponsor.

## STANDARD EXHIBIT

**2 Lakhs\*** | 1 Working Staff Pass  
2 Complimentary Delegate Passes

Exhibitors can generate strong sales leads and raise their firms' profile in the investment community through this opportunity to interact face-to-face with industry decision-makers and achieve business development goals. Display and demonstrate your firm's products and services directly to local investment professionals. Morning and afternoon refreshment breaks will be served in the exhibit area.

# BRANDING OPPORTUNITIES

## LUNCH SPONSOR

**3 Lakhs\*** | 1 Available  
3 Complimentary Delegate Passes

The lunch sponsorship provides your firm with the opportunity to indirectly engage a large audience and receive recognition as a supporter of the event. The Lunch Sponsor is promoted through onsite signage and branded table tents at the buffet lunch stations.

## DELEGATE BAG SPONSOR

**3 Lakhs\*** | 1 Available  
3 Complimentary Delegate Passes

As a Delegate Bag Sponsor, your firm enjoys high visibility by cobranding on each delegate's bag. Each delegate will receive a bag upon arrival containing all the relevant information. This opportunity is limited to one sponsor.

## RECHARGE SPONSOR

**3 Lakhs\*** | 1 Available  
3 Complimentary Delegate Passes

As the Recharge Sponsor, your firm connects directly with conference delegates by providing them with access to mobile device charging stations. Branded signage and marketing collaterals will be displayed at the mobile device charging station.

\* Exclusive of tax.

# SPONSORSHIP AND EXHIBIT PROGRAMS

SPONSORSHIP OPPORTUNITIES	SPONSORSHIP PROGRAM			EXHIBIT PROGRAM
	Platinum	Gold	Silver	Standard Exhibit
<b>Price (in INR) exclusive of tax</b>	<b>7 lakhs</b>	<b>5 lakhs</b>	<b>3 lakhs</b>	<b>2 lakhs</b>
<b>DELIVERABLES</b>				
<b>PRE-EVENT</b>				
Digital recognition on the dedicated conference website's sponsor section	•	•	•	•
Recognition in promotional emails and/or print advertisements	•	•	•	
One-time use of the pre-event physical mailing list and opt-in email list	•	•	•	•
<b>ONSITE</b>				
Branding on delegate badges	•			
Branding on event directional signage	•	•		
Complimentary delegate pass: full access to the conference	<b>9</b>	<b>6</b>	<b>4</b>	<b>2</b>
Pass for working staff	<b>1</b>	<b>1</b>	<b>1</b>	<b>1</b>
Marketing collateral (one piece) included with delegate conference materials	•			
Print advertisement in conference materials	<b>1 Page</b>	<b>1 Page</b>	<b>1/2 Page</b>	
Recognition in onsite conference branding: conference backdrop, tent card, housekeeping slides	•	•	•	•
Recognition in sponsor section of delegate conference materials	•	•	•	
Announcement of sponsor during the conference by conference chairman	•	•	•	•
Table top exhibit space*	•	•	•	•
<b>POST-EVENT</b>				
One-time use of the post-event physical mailing list and opt-in email list	•	•	•	•

\* Exhibit selection order is determined by the sponsorship level and the chronological order in which signed agreements are submitted.

# BRANDING OPPORTUNITIES

BRANDING OPPORTUNITIES	SPONSORSHIP PROGRAM		
	Lunch Sponsor	Delegate Bag Sponsor	Recharge Sponsor
<b>Price (in INR) exclusive of tax</b>	<b>3 lakhs</b>	<b>3 lakhs</b>	<b>3 lakhs</b>
<b>Quantity Available</b>	<b>1</b>	<b>1</b>	<b>1</b>
<b>DELIVERABLES</b>			
<b>PRE-EVENT</b>			
Digital recognition on the dedicated conference website's supporter section	•	•	•
Recognition in promotional emails and/or print advertisements	•	•	•
One-time use of the pre-event physical mailing list and opt-in email list	•	•	•
<b>ONSITE</b>			
Branded tent cards at the buffet lunch stations	•		
Branded signage at mobile device charging station			•
Marketing collateral display at mobile device charging station			•
Cobranding on each delegate's bag		•	
Complimentary delegate pass: full access to the conference	<b>3</b>	<b>3</b>	<b>3</b>
Print advertisement in conference materials	<b>1/2 Page</b>	<b>1/2 Page</b>	<b>1/2 Page</b>
Recognition in onsite conference branding: conference backdrop, tent card, housekeeping slides	•	•	•
Recognition in supporter section of delegate conference materials	•	•	•
Announcement of sponsor during the conference by conference chairman	•	•	•
<b>POST-EVENT</b>			
One-time use of the post-event physical mailing list and opt-in email list	•	•	•

# DELEGATE SPONSOR PACKAGE

Number of Delegates	Early-Bird (before 11 Dec 2018)		Regular	
	25	50	25	50
<b>Special rate per delegate (INR)</b> (exclusive of tax)	<b>6,000</b>	<b>5,000</b>	<b>7,000</b>	<b>6,000</b>

## ADDITIONAL BENEFITS:

Company logo on conference backdrop		•		•
Company logo on official conference website	•	•	•	•
Company logo on housekeeping slides	•	•	•	•
Company logo on conference booklet	•	•	•	•

DELEGATE REGISTRATION FEES (exclusive of tax)	Regular	Early-Bird Discount*
CFA Institute / CFA Society India members	INR7,500	INR2,000 per person
CFA® Program candidates	INR8,000	INR2,000 per person
Non-members	INR9,000	INR2,000 per person
<b>Early-bird discount*</b> ends after 11 December 2018		

## DEADLINES FOR ENROLLMENT AND SUBMISSION

Enrollment in sponsorship package	<b>11 December 2018 (Tue)</b>
Submission of company logo and description	<b>14 December 2018 (Fri)</b>
Delegate details for complimentary delegate pass and working pass	<b>27 December 2018 (Thur)</b>
Cancellations are subject to a cancellation and handling charge of INR2,000	<b>After 19 December 2018 (Wed)</b>