

15th MUTUAL FUND SUMMIT

Investment Opportunities for New India

May 26, 2023 – Hotel Le-Meridien, New Delhi

Invited Chief Guest



Shri Pankaj Chaudhary
Hon'ble Minister of State for Finance
Government of India

Keynote Speaker



Shri Ananta Barua
Whole Time Member
Securities & Exchange Board of India (SEBI)

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In today's volatile market environment, mutual funds are looked upon as a transparent and low cost investment vehicle, which attracts a fair share of investor attention promoting the growth of the industry. The Indian mutual fund industry is one of the fastest growing and most competitive segments of the financial sector. The robust market performance over the past few months helped investors renew faith in stock market as a result the value of assets owned by retail investors increased by 9.3% to US\$ 282.9 billion in January 2023, reflecting an increase in their interest in the Indian mutual fund industry.

As per AMFI, the Assets under management of the Mutual Fund Industry has been increased from Rs. 7.01 trillion to Rs. 39.42 trillion, more than five-fold increase from March '2013 to March '2023 in a span of 10 years. However, the Mutual Fund penetration in India is much lower than the world average and many other developed economies. While the US has its AUM more than the country's GDP at 103 per cent, it is only 11 per cent in India. The strong growth in the last five years has been attributed to higher financial savings combined with growing investor awareness of such products. The low market coverage of the mutual fund industry is also seen as an opportunity to grow further.

Many problems relating to investors, particularly, small investors can be tackled by educating the investors. Small investors should be encouraged to either invest through Mutual Fund mechanisms, or should take investment decisions only after getting adequate information about risks and rewards. As the industry sensitizes itself to the changing regulatory landscape, business strategies are gearing to respond to these developments. Amidst this changing business and regulatory environment, Asset Management Companies and all service providers, including distributors, have to re-examine their business models and embrace the changing business landscapes.

The objective of the program is to create a larger pool of informed investors and simultaneously encourage a greater number of common people to participate in the corporate economy through various investment instruments. The deliberations will focus on reaching out to investors and to familiarize them with the basic fundamentals of investment and risk management and their rights and responsibilities, and to build confidence among them to invest in government as well as corporate securities, so that not only the corporate markets grow but so does the Indian economy.

Therefore, in order to discuss these aspects further in mutual fund industry, ASSOCHAM is organizing 15th Mutual Fund Summit at 9:30 a.m. on May 26, 2023 at Hotel Le Meridien in New Delhi. There will be a large participation by the stakeholders to discuss and define the next phase of growth of mutual fund industry along with challenges and solutions.





KEY ISSUES FOR DISCUSSION

- Advantages of investing in Mutual Funds
- Myths and Facts about Mutual Funds
- An outlook for debt fund
- The Investment pattern of HNIs, FIIs
- Understanding Risks Associated with Mutual Fund Investment.
- Regulatory framework for sustaining long term growth
- Channelising household savings into Mutual Fund
- New fund houses- challenges and scalability
- Changing tax structure
- Implications of Removal of Indexation benefits for debt oriented saving plans
- Raising greater participation an under low penetrated market
- Protecting & promoting interest of Investors.
- Technological Integration of Distribution & Delivery Channels.
- Role of Financial Planning – Awareness, Product Customization & Distribution
- Distribution Strategies and Regulations in Indian Mutual Fund Industry
- Investors Perceptions and Preferences for Mutual Fund
- Challenges of Mutual Fund Industry: Reaching out to retail investors
- Internal and External Factors in Mutual Funds Performance.
- Portfolio Allocation, Risk and Performance Evaluation of Mutual Funds.
- Global Mutual Fund Investing: Using Funds to Investment decision.
- Evolving Principles of Fund Governance
- Role of an Intermediary in Mutual Fund Sales
- Asset Allocation – The model that suits the Investor
- Mutual Fund – Basics Structure, Standards & Disclosures
- Portfolio Diversification
- The Future of Fund Management
- Sustaining Investor Confidence in Mutual Funds.
- Distribution challenges for mutual funds.
- Mutual fund performance and fund ratings

PARTICIPANTS PROFILE

- Fund Managers
- Foreign Institutional Investors
- Asset Management Companies
- Indian and Multinational Banks
- Domestic & Foreign Financial Institutions
- Large & Medium Corporate Houses
- Software Solution Companies
- BFSI Consultants
- Corporate Investors
- High Net worth Individuals
- Asset Managers / Portfolio Managers
- Lead Managers
- CFO's, CEO's & CIO's
- Compliance Officers
- Investment Advisors
- Corporate Trustees
- Distributors
- Government Officials and regulators
- Investment/Research Analysts
- Financial Planners and Independent Consultants
- Insurance and other service providers
- Tax and Accounting Executives
- Prime Brokers

INVITED EMINENT SPEAKERS FROM

- SEBI
- Ministry of Finance
- Ministry of Corporate Affairs
- Reserve Bank of India (RBI)
- Association of Mutual Funds in India (AMFI)
- Mutual Fund Houses
- Indian and Multinational Banks
- Advisors and Fund Managers
- Distribution Houses
- Research Organizations
- Financial Institutions
- Foreign Institutional Investors
- Large and Medium Corporate Houses
- Consulting and Rating Agencies

SPONSORSHIP OPPORTUNITIES

The Summit provides an excellent opportunity for organizations/companies to promote their product & services to the focused audience besides networking during tea/coffee and lunch intervals. The sponsorship details are as under:

Summit Partner – Rs. 10 Lakhs

- Status of 'Summit Partner' and the Partner's name and logo will be prominently displayed at the Summit venue.
- Branding of company logo at the main backdrop at the Summit Venue
- Branding of company Logo in newspaper advertisement
- Logo branding in Thank you panel at the Summit Venue
- Logo branding in event brochure
- Speaker Slot to a company representative in Inaugural session & Technical session
- Corporate Video Play at Summit during the Tea and Lunch Break (4 min only)
- Logo branding on the event Mailers
- Logo on the ASSOCHAM event Webpage
- Branding in ASSOCHAM's Social Media Platform
- Acknowledging sponsor name during the event
- Complimentary exhibition space (Stall measuring 2 x 2 mtr.) at the Summit venue
- Insertion of Company's brochure into the documentation pack
- 15 Complimentary Passes to attend the Summit

Principal Sponsor – Rs. 7 Lakhs

- Branding of company logo at the main backdrop at the Summit Venue
- Branding of company Logo in newspaper advertisement
- Logo branding in Thank you panel at the Summit Venue
- Logo branding in event brochure
- Speaking opportunity as Panellist in 2 Technical Sessions
- Corporate Video Play at Summit during the Lunch Break (3 min only)
- Logo branding on the event Mailers
- Logo on the ASSOCHAM event Webpage
- Branding in Social Media Platform
- Complimentary exhibition space (Stall measuring 2 x 2 mtr) at the Summit venue
- Insertion of Company's brochure into the documentation pack
- 10 Complimentary Passes to attend the Summit

Technology/Banking/ Innovation Partners – Rs. 5 Lakhs

- Branding of company logo at the main backdrop at the Summit Venue
- Branding of company Logo in newspaper advertisement
- Logo branding in Thank you panel at the Summit Venue
- Logo branding in event brochure
- Speaking opportunity as Panellist in 1 Technical Session
- Corporate Video Play at summit during the Tea/Coffee Break (2 min only)
- Logo branding on the event Mailers
- Logo on the ASSOCHAM event Webpage
- Branding in Social Media Platform
- 7 Complimentary Passes to attend the Summit

Co-Sponsor – Rs. 3 Lac

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding on the event Mailers.
- Logo branding in Thank you panel at the Summit Venue.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- Insertion of Company's brochure into the documentation pack.
- 5 Complimentary Passes to attend the Summit.

Supporter – Rs. 1 Lac

- Logo visibility on event Backdrop.
- Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo Branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- 3 Complimentary Passes to attend the Summit.

Note: It is imperative that Partner / Sponsorship details and Advertisement material are received by us latest by **May 12, 2023**. The support options are strictly on first cum first served basis.

Participation Fee: Rs.3,000/- (Including GST)

For further details please contact:

Mr. Ankit Krishna

M: +91 78385 67953

E: ankit.krishna@assochem.com

Mr. Pradeep Gupta

+91 98181 51246

E: pradeep.gupta@assochem.com



The Associated Chambers of Commerce & Industry of India (ASSOCHAM)

4th Floor, YMCA Cultural Centre and Library Building

01 Jai Singh Road, New Delhi – 110 001

Ph: 011-46550555 Fax: 91-11-23017008/9 • Web: www.assochem.org