

# FPAM WORKSHOP OUTLINE



Title: **GE14 Anniversary Market Updates for Investment Planners and Portfolio Managers.**  
Date: 27 July 2019, Saturday (Full day)  
Venue: Evergreen Laurel Hotel, Penang  
Points: 10 CPE Points / 10 CE Points / 8 CPD Points  
Facilitator: Mr. Phua Lee Kerk

## **Learning Outcome**

Participants will be able to:

1. Identify the impact of trade war on global economy, interest rate policy and RM1 trillion impact
2. Relate market and economic cycles to investment performance and determine the best strategies and portfolio structure
3. Identify the impact of asset classes behavior
4. Determine the asset allocation in various scenarios external and internal uncertainties
5. Identify the risk to capital markets
6. Discuss the recent the World of digital economy, AI and Economic Pandora's box;

## **Learning Outline**

| <b>Time</b>      | <b>Details</b>   |
|------------------|--|
| 8:30 - 9:00 am   | <b>Registration</b>  |
| 9:00 – 10:30 am  | <b>US Economy and Trump's policies</b><br>a. Does Fed behind the curve?<br>b. Will the world drag in trade war?<br>c. The impact of immigration policy on job creation and innovations |
| 10:30 – 10.45 am | <b>Coffee Break</b>  |

| <b>Time</b>     | <b>Details</b>   |
|-----------------|--|
| 10:45 – 1:00 pm | <p><b>Challenges in Europe</b></p> <p>a. Is the worst yet to come on Brexit?<br/> b. Will EU retaliate if Trump initiate trade tariffs on EU goods?<br/> d. The impact of these uncertainties to European economy and Euro currency</p> <p><b>Is China Heading for Perfect Storm?</b></p> <p>a. What will be the impact to China economy due to trade war?<br/> b. Will weakening Yuan trigger currencies war in Asia?<br/> c. Will China be able to reform?<br/> d. Is Belt and Road a solution to trade war?</p> |
| 1:00 – 2:00 pm  | <b>Lunch Break</b>   |
| 2:00 – 3:30 pm  | <p><b>Japan and other Asia countries: Geopolitical Time Bomb?</b></p> <p>a. Will Trump’s foreign policy, South China Sea and North Korea risks explode?<br/> b. Besides SST, can Malaysia find a new revenue stream to offset GST?<br/> c. Is RM1 trillion an issue or excuse to foreign investors?</p>  |
| 3:30 – 3:45 pm  | <b>Coffee Break</b>  |
| 3:45 – 5:00 pm  | <p><b>Investment Strategies forward and backward</b></p> <p>a. Behaviour of different asset classes in this uncertain environment<br/> b. Does conventional assets allocation<br/> c. Robo advisors and implications to portfolio management<br/> d. Dawn of Fintech</p>   |

***Profile of Mr Phua Lee Kerk***

Phua Lee Kerk, CFA, is currently the Chief Strategist of Phillip Research. He has wide and varied experience in the financial advisory and portfolio management fields, having worked in Japan, Malaysia and Singapore for more than 29 years with companies like Smith Barney (now Salomon Smith Barney), Barings Securities (now ING Baring), Vickers Ballas, Jupiter Research, APS Asset Management and Pheim Unit Trusts Berhad.

He has presented various papers on investment (equity, bond, derivatives, risk management, financial planning and others), corporate finance and M&A both locally and overseas in conferences and seminars organized by World Bank, UNESCO, UNIDO, Securities Commission, Bursa Malaysia, Bank Negara, MII, FPAM and others.

He is currently a Director of the Kuala Lumpur and Selangor Chinese Assembly Hall, Central Committee of Malaysia-China Chamber of Commerce and committee member of the Economic Research Board of The Federation of Chinese Associations Malaysia (FeCAM). He served as a director for Centre for Malaysian Chinese Studies and ASJA International. He was also Governor of ASCOJA, President of Japan Graduates’ Association in Malaysia and working member of Malaysia Plan of Actions. He is also co-writer of the book “A Practical Approach to Mergers and Acquisitions in Financial Services Industry”.

## CE WORKSHOP REGISTRATION FORM / INVOICE

|   |   |
|---|---|
| Title of Workshop:  | <b>GE14 Anniversary Market Updates for Investment Planners and Portfolio Managers</b>   |
| Facilitators:   | Mr. Phua Lee Kerk   |
| Date:   | 27 July 2019 / Saturday [ full day ]  |
| Venue:  | Evergreen Laurel Hotel, Penang  |
| Registration:   | 8.30 am – 9.00 am   |
| Time:   | 9.00 am – 5.30 pm   |
| Fees:   | <b>Early Bird Special; RM 205 (FPAM Member), RM255(Non-members)<br/>Payment by 19<sup>th</sup> July 2019.</b><br>Normal – RM 255 (FPAM Member), RM 305 (Non-members)<br>The fee includes workshop materials, lunch and refreshments.  |
| CE Points (FPAM):<br>CPE Points (SIDC):<br>CPD Points (FIMM): | Ten ( 10 )<br>Ten ( 10 )<br>Eight ( 8 )   |
| Instructions:   | Please fill-up this form and fax to +603 7954 9400 or e-mail to events@fpam.org.my <b>by 19<sup>th</sup> July 2019 for early bird rate.</b>   |
| Payment/Invoice:  | <b>By cheque:</b> Payable to ‘Financial Planning Association of Malaysia’. Address: Unit 305, Block A, Phileo Damansara I, Jalan 16/11, off Jalan Damansara, 46350 Petaling Jaya, Selangor.<br><b>By credit card:</b> We will process and charge your credit card upon receipt of this form. This page serves as our official invoice. No further invoice will be issued. |
| Enquiries:  | Send e-mail to events@fpam.org.my or call Lim Peng Peng at 017-518 7760   |
| Terms:  | Registration is on a first-come-first-served basis. Confirmation is subject to payment before the course. Walk-in participant/s will be admitted on the basis of space availability. FPAM reserves the right to amend the program, speaker, date, venue, etc, without prior notice.   |

### YES, PLEASE REGISTER ME!

|                      |  |            |  |
|----------------------|--|------------|--|
| Name:                |  |            |  |
| IC No.:              |  | FPAM No. : |  |
| Company & Address:   |  |            |  |
| E-mail:              |  | Telephone: |  |
| SC Licence / ERP No: |  | Mobile:    |  |
| Contact Person:      |  | Telephone: |  |

### Mode of Payment

|  |              |
|--|--------------|
| By cash, please bank into <b>Alliance Bank A/C 1210 9001 0005 395</b> and email or fax in bank-in slip   |              |
| Cheque payable to <b>Financial Planning Association of Malaysia.</b>   |              |
| Cheque no.:  | Amount: RM   |
| Charge my credit card: <input type="checkbox"/> Visa <input type="checkbox"/> Mastercard <input type="checkbox"/> Amex <input type="checkbox"/> Diners |              |
| Credit card no.:   | Expiry date: |
| Amount :   |              |
| <b>Early Bird Special – By 19<sup>th</sup> July 2019 / Closing Date 25<sup>th</sup> July 2019</b>  |              |

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