

MOVING FORWARD WITH DIGITAL INVESTMENT MANAGEMENT

30 NOVEMBER 2022 | 10.00 AM - 12.00 PM



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Learning Hours:
2 hours



Fees:
MYR 350
(fee is not inclusive of 6% SST)



CPE Points Earned:
5 CPE Points

MODERATOR



Tehmina Kaoosji



Julian Ng



Ian Lloyd



Juliana Abu Bakar



Izwan Zakaria

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PROGRAMME OVERVIEW

The Malaysian capital market has witnessed a significant acceleration of digital adoption in the capital market across various digital platforms. The Securities Commission Malaysia has highlighted in its Annual Report 2021 that total asset under management (AUM) of Digital Invest Management has grown to more than RM1 billion as at end 2021. In the same year, one Digital Investment Manager was granted a license bringing a total of eight DIM companies currently in operation.

Looking at the digital transformation and disruption in the fund management industry, it is worth to note that the digital investment manager or commonly known as Robo-advisors is performing as good as the traditional fund managers along with the growth potential of the platforms. In light of the progress and developments, are DIMs better than traditional fund managers? And is it safe?

This programme aims to provide insights into the trends and potentials of DIM as well as the impact it brings to the capital market.

PROGRAMME OBJECTIVE

This programme will discuss the latest trends and developments of DIM in Malaysia, its potential opportunities, data and investment safety features, as well as the expected Malaysian regulatory requirements.

ICF COMPETENCY LEVEL

- Foundational (Product)
 - Capital Market Environment (Proficiency Level 3)
- Foundational (Product)
 - Capital Market Products (Proficiency Level 3)
- Functional (Technical)
 - Digital Technology Application (Proficiency Level 3)

LEARNING OUTCOMES

By the end of this programme, participants will be able to:

- recognise the latest developments surrounding the Robo-advisory industry ecosystem
- describe the opportunities that DIM may offer to investors and its role in making an informed investor
- assess the safe protection measures provided in ensuring data and investment security
- discuss the regulatory requirements governing the Digital Investment Management industry in Malaysia

METHODOLOGY

Interactive presentations, case studies discussions and Question-and-Answer (Q&A) sessions

WHO SHOULD REGISTER?

Individuals

Fund Managers, Dealer Representatives, Futures Trading Representatives, Digital and Innovation Officers, Analysts, Chief Financial Officers, Financial Controllers, Strategic Planning Officers, Professionals undertaking corporate advisory work, Compliance Officers, Risk Management Officers, Business Continuity Planning (BCP) Teams, Accountants, Partners of Firms, C-Suites.

Institutions

Fund Management Companies, Public Listed Companies (PLCs), Legal Firms, Consultancy Firms, Accounting Firms, Stockbroking Firms, Investment Banks, Commercial Banks, Alternative Financing Platforms, Start-ups, Exchanges.

WHAT WILL YOU LEARN?

10.00 am - 12.00pm (2 hours)

Is Robo-Advisory the New Investment Paradigm or Merely a Fad?

- How Robo-advisory/ digital investment management (DIM) differs from the traditional approach?
- Analysing the demographics of Robo-advisory industry
- Robo vs human advisor: Who is likely to win or lose more?
- What is stopping the use of Robo-advisory services?

Opportunities of Robo-Advisory Growth in Malaysia

- Impact of Covid-19 pandemic to Robo-advisory industry
- Growing interests from millennials and Gen Z
- Investor education programme and social media influence
- FinTech advancement and 5G technology accelerating the adoption of Robo-advisory

Do Robo-Advisors Make Us Better Investors?

- Robo-advisors role in the generating well-informed investors
- Performance of DIM vs traditional funds

How Safe is your Data in Robo-Advisory

- Data protection and cybersecurity
- Disclosure standards and transparency
- Trust in Robo-advisors

Regulatory Requirements of Robo-Advisory/ Digital Investment Management (DIM) in Malaysia

- Guidelines on Compliance Function for Fund Management Companies

Moderator:

Tehmina Kaoosji Independent Broadcast Journalist

Panellists:

Julian Ng CEO & Co-Founder, Akru

Ian Lloyd Group Chief Digital Officer, Kenanga Investment Bank Berhad

Juliana Abu Bakar Country Head, Wahed Malaysia

Izwan Zakaria Managing Partner, Izwan & Partners

12.00pm End of Programme

MODERATOR



Tehmina Kaoosji

Tehmina Kaoosji is a Communications Consultant, Broadcast Journalist and Gender Equality Activist currently based in Kuala Lumpur, Malaysia. A familiar and in-demand broadcast face, Tehmina has more than a decade of LIVE breaking news and current affairs programming experience.

She currently anchors 'Wacana English', Sinar Harian's flagship current affairs talk show. She previously anchored 'Money Matters', TV3 Malaysia's flagship financial talk show. She was with the Malaysian National News Agency (BERNAMA), from 2014-2020, anchoring and producing special projects and annual highlights like the National Budget and Election coverage. She also anchored and produced the feminist talkshow 'Tea with Tehmina', and 'Bernama Today' & 'The Nation', focusing on topics of national and regional current affairs.

Tehmina is a Thomson Reuters Foundation Fellow and TedX Malaysia alumni. She has spoken at Malaysian Parliament on Online Hate Speech & Disinformation as part of the Asean Parliamentarians for Human Rights (APHR). She participated in the German Federal Foreign Office's Disinformation & Media Freedom workshop in Berlin. She has participated in the Estonian Ministry of Foreign Affairs Journalism & Media Ethics Training in Tallinn, Estonia.

Tehmina combines solid news judgement with an engaging broadcast personality. She is a versatile and highly experienced moderator of high-level debates and conferences on a wide range of subjects- from business, economy and technology, to politics and women's rights, sustainable development, public interest issues and media freedom. Her expertise in deftly presenting and steering debate and conversations around Malaysian-centric news while keeping a broader lens on Asia and the global arena, assures non-partisan, solutions journalism outcomes. Audiences and clients applaud Tehmina's ability for humanising stories and contextualising broad based economic, political and social justice issues with grassroots realities.

In addition to her work with Malaysian media organisations, Tehmina also runs a boutique communications consultancy, The Big Picture, which specialises in advocacy and policy based outcomes for international organisations such as the United Nations Population Fund. Her work also focuses on collaboration and strategising with civil society and in particular, women's rights organisations.

PANELLISTS



Julian Ng

Julian Ng has about 20 years of experience in the investment banking industry has worked regionally in Malaysia, Singapore and Hong Kong. He also produced and hosted prime-time business and finance shows on BFM89.9, the business radio station. He co-founded and is the Chief Environment Officer of Akru, a robo-advisor, where you can invest better, cheaper and quicker online. Akru is licensed by the Securities Commission Malaysia for Digital Investment Management.



Ian Lloyd

Ian Lloyd is an established fintech specialist, working closely with teams at the intersection of business and technology to create category-defining products and services with a focus on collaborative, ecosystem-driven business models. Ian comes with expertise in driving global financial technology-enabled transformation portfolios as well as leading multi-disciplinary rapid prototyping teams for co-creating innovation. He has worked with financial institutions across ASEAN, Europe, and the United States to tackle their biggest challenges and to prepare for the future world of work.



Juliana Abu Bakar

Juliana Abu Bakar is the Country Head for Wahed in Malaysia. As the CEO of Wahed's Malaysian entity, Wahed Technologies Sdn Bhd., her responsibilities include managing local offerings, implementing growth strategies and spearheading marketing and business development functions in Malaysia. Juliana has the experience of over 20 years in the fields of product management, business development and marketing particularly in the area of e-wallet/digital payments while serving in various organizations such as Telekom Malaysia, Celcom Axiata Berhad, Digi Telecommunications Sdn Bhd and Touch 'n Go Sdn Bhd. In Touch 'n Go, she developed and operationalized Touch 'n Go e-wallet as a new product, including obtaining related regulatory approvals from Bank Negara Malaysia. She also successfully enhanced use cases for the e-wallet by collaborating with strategic partners, along with obtaining online and physical merchants to accept the e-wallet as a new form of cashless payment.



Izwan Zakaria

Izwan Zakaria is the managing partner of Izwan & Partners, a Kuala Lumpur based corporate law firm helping startups and technology companies do business and raise capital. Izwan has considerable experience in areas such as fundraising, fintech, venture capital funds, social enterprises on matters ranging from compliance to funding agreements.

His key niche practice includes his direct experience in acting for regulated online and digital businesses such as equity crowdfunding, P2P lending, ecommerce, and robo-advisory platforms and other disruptive technologies on compliance matters relating to regulatory changes as set out by the Central Bank and the Securities Commission of Malaysia.

Izwan is active and deeply involved in the startup ecosystem in Malaysia. As a regular contributor sharing tips involving legal matters for founders on his personal blog 'Startup Law Blog', he is also a mentor for several leading startup accelerators such as The Founder's Institute (a pre-seed start-up accelerator with a presence in over 180 cities worldwide), Malaysian Global Innovation & Creativity Centre (MaGIC), and Singapore Centre for Social Enterprise (raiSE).

Izwan is currently a member of the Technology Expert Committee by the Asian International Arbitration Centre and also the Fintech Association of Malaysia (FAOM). Izwan was also consulted by the World Bank which led him co-authoring a report on assessing startup financing in Malaysia. In 2020, Izwan was named as one of the '30 people to watch in the business of law' by The Asia Law Portal.

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*The SIDC reserves the right to amend the programme as deemed appropriate as without prior notice.

For enquiries on registration, please contact: **+603 6204 8439 / 8274** | Register today at www.sidc.com.my

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