

Shenzhen: 9 May | Futian Shangri-la Hotel  
Hong Kong: 10-11 May | Island Shangri-la Hotel

## Conference Agenda

### Wednesday 9 May | Futian Shangri-la, Shenzhen

07:45	<b>Bus Transfer from Hong Kong (One IFC) to Futian Shangri La Shenzhen (RSVP required)</b> <i>Departure point: Hong Kong Station Exit D</i>	
09:00	<b>Bus Transfer from Hong Kong (One IFC) to Shenzhen (RSVP required)</b> <i>Departure point: Hong Kong Station Exit D</i>	
09:00	<b>Conference Registration</b>	Level 14
09:30-18:15	One-on-One / Group Meetings will run concurrently. Please refer to your one-on-one schedule for more details	Level 14-15
12:45-12:50	<b>Welcome Address</b> Mr Stephen Wolfe, Executive Director, China Country Head of Commodities and Global Markets, Macquarie	Level 2, Grand Ballroom 3
12:50-13:45	<b>Lunch Keynote: MSCI - The Second-Largest Equity Market to Join Global Benchmark: Are you Ready?</b> Dr Shan Lan, Ph.D., Global Head of Index Strategy, Macquarie Mr Patrick Dai, Head of A-Share Research, Macquarie <ul style="list-style-type: none"> <li>• Implementation details of the A-share inclusion in MSCI &amp; Future Roadmap</li> <li>• Impact to China A-shares including potential passive and active flows, to other EM countries</li> <li>• Trading ideas</li> <li>• Recent trends and future developments for Stock Connects</li> <li>• Macquarie's house view on China A-shares including sector and stock top-picks</li> </ul>	Level 2, Grand Ballroom 3
15:15	<b>Bus Transfer from Futian Shangri La Shenzhen to Hong Kong (One IFC) (RSVP required)</b> <i>Departure point: Hotel lobby, Futian Shangri La</i>	
17:30	<b>Bus Transfer from Futian Shangri La Shenzhen to Hong Kong (One IFC) - Island Shangri-la Hotel (RSVP required)</b> <i>Departure point: Hotel lobby, Futian Shangri La</i>	
18:30	<b>Bus Transfer from Futian Shangri La Shenzhen to Hong Kong (One IFC) - Island Shangri-la Hotel (RSVP required)</b> <i>Departure point: Hotel lobby, Futian Shangri La</i>	

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## Conference Agenda

Thursday 10 May | Island Shangri-la Hotel, Hong Kong

08:30	<b>Conference Registration</b>	Level 39, The Library
09:00-18:15	One-on-One / Group Meetings will run concurrently. Please refer to your one-on-one schedule for more details	Level 39-40
10:00-11:00	<b>Panel: China Macro – Economics, Property, Commodities and Infrastructure</b> Mr Ric Deverell, Chief Economist and Head of Macro Research, Macquarie Mr Tom Price, Head of Commodities Research, Macquarie Mr David Ng, Head of Hong Kong China Research, Macquarie Host: Dr Larry Hu, Ph.D., Head of China Economics, Macquarie	Level 39, Atrium Room
11:15-12:15	<b>Presentation: The Next Step in VR</b> Mr Henry Zhou, Founder & CEO, Pico VR Host: Mr Allen Chang, Head of Greater China Technology and Telecom Research, Macquarie <ul style="list-style-type: none"> <li>Leading Chinese VR Brand, specializing in standalone VR (build-in computing in VR headset)</li> <li>Strong manufacturing partner, Goertek, with R&amp;D driven managements</li> </ul>	Level 39, Atrium Room
12:30-12:40	<b>Welcome Address</b> Mr Jeffrey Shiu, Senior Managing Director, Head of Innovative Equity Solutions Asia, Commodities and Global Markets, Macquarie	Level 5, Island Ballroom
12:40-13:45	<b>Lunch Keynote: AI &amp; Computer Vision</b> Mr Xu Bing, Co-founder, SenseTime Host: Mr Allen Chang, Head of Greater China Technology and Telecom Research, Macquarie <ul style="list-style-type: none"> <li>AI industry, computer vision, AI-enable projects such as Smart City, Smart Surveillance</li> </ul>	Level 5, Island Ballroom
14:00-15:00	<b>Panel: The Crux of the Beautiful Life in China: Co-Work and Co-Live</b> Mr Keith Chan, Chief Executive Officer, Funlive Mr Jacob Feenstra, Head of Sales & Marketing, Campfire Mr Josh Zhou, Executive Partner, GoHigh Capital Mr Jordan Kostelac, Senior Consultant, Jones Lang LaSalle Host: Mr David Ng, Head of Hong Kong China Research, Macquarie <ul style="list-style-type: none"> <li>Stakeholders from co-work and co-live industries to share their views on this rising trend</li> </ul>	Level 39, Atrium Room
17:00-20:00	<b>Drinks Reception</b>	Level 56, Roof Garden



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#### Friday 11 May | Island Shangri-la Hong Kong

08:30	<b>Conference Registration</b>	Level 39, The Library
09:00-18:15	One-on-One / Group Meetings will run concurrently. Please refer to your one-on-one schedule for more details	Level 39-40
10:00-11:00	<b>Presentation: Power Battery Battleground: Survival of the Largest</b> Mr NIE Xin, Founder and CEO, RealLi Research Host: Mr Allen Yuan, Hong Kong China Auto Research Analyst <ul style="list-style-type: none"> <li>The slowdown in NEV sales growth will coincide with deep consolidation of the upstream industry, especially EV batteries</li> <li>Battery players need scale and, to a lesser extent, a diversified client base and technology edge, to survive during the early stages of consolidation</li> <li>An industry update on power battery procurement prices, how pricing pressure from the subsidy cut is passed onto battery material suppliers, battery installation trends and policy outlook</li> </ul>	Level 39, Atrium Room
11:15-12:15	<b>Panel: Beyond Blockchain – Crypto Asset Trends, Challenges and Disruption</b> Mr Jean Louis Van der Velde, Chief Executive Officer, Bitfinex Mr Greg Li, Head of Asia, The Bitfury Group Mr Alex Liu, Chief Executive Officer, Amis Technologies Hosts: Mr Daniel Clarke, Head of Sales & Sales Trading, Taiwan, Macquarie; Mr Jesse Knutson, Head of Taiwan Equity Capital Solutions, Macquarie <ul style="list-style-type: none"> <li>The idea being that banks are fixated on blockchain (which is really just an inefficient database)...when all the exciting and disruptive applications are coming from crypto currencies.</li> </ul>	Level 39, Atrium Room
12:30-13:45	<b>Lunch Keynote: How Social Media and Street Fashion are Reshaping Consumption</b> Mr Kevin Poon, Co-Founder, CLOT Mr Fed Tan, Co-Founder, Managing Director, Social/ Capital Mr Sean Wong, VP of Retail, Hypebeast Host: Ms Linda Huang, Head of Consumer Research Asia, Macquarie	Level 5, Island Ballroom