

FACHPANEL

Is now the time to invest in China Equity?

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SEMINARRAUM 2 (MIT VIDEO)

English

Referent(en): Richard Adams, Projit Chatterjee, Prof. Dr. Ingo Beyer von Morgenstern, Alice Wang

Moderation: Harry Büsser

How is the Chinese stock market doing? How political is the stock market in China? What are the implications of the regulations announced by the Chinese government for investors? Which industries are currently to be avoided and which are the winners?

Richard Adams

Vice President, Senior Investment Director, American Century Investments

Richard Adams is vice president and a senior investment director for American Century Investments, a premier investment manager headquartered in Kansas City, Missouri. He is based in the company's London office. Richard is responsible for representing the firm's investment capabilities and views across all asset classes to clients in Europe, the Middle East and Africa. Prior to joining American Century Investments in 2018, he was a director and client portfolio manager covering global, U.S. and Japan equities for Columbia Threadneedle Investments. He previously served as a senior fixed income specialist at Columbia Threadneedle. Prior to that, Richard was a fixed income portfolio manager for ING Investment Management. He also served as a U.S. equity portfolio manager at Singer & Friedlander. He has worked in the investment industry since 2001. Richard holds a bachelor's degree in history and a master's degree in finance, both from the University of London.

Projit Chatterjee

CFA, Senior Equity Specialist, EM and Asia Pacific Equities Managing Director, UBS Asset Management

Projit Chatterjee is a Senior Equity Specialist within the Emerging Markets and Asia-Pacific Equities team. He has primary responsibility for overall product positioning and development of Emerging Markets and Asian equity strategies, as well as marketing and communication of these strategies to existing and prospective clients globally. He is a member of the Emerging Markets Equity Strategy Committee and is based in Singapore. Projit joined UBS in 1997 as a Corporate Finance Analyst with UBS Investment Bank in Mumbai, India. In 1999, he moved to UBS Asset Management in Zurich to work in Strategic Projects, International Fund Marketing. In Zurich, Projit held various roles in the areas of strategic business development, business management and investment solutions. He also led an acquisition project in the Indian market.

Prof. Dr. Ingo Beyer von Morgenstern

Research Partner of ACATIS KVG mbH for the „ACATIS QILIN Marco Polo Asien Fonds“

Senior Partner Emeritus at McKinsey & Company, first 20 years in Europe, then 10 years in China. Responsible for leading the Global High Tech Telecom-Media Practice at McKinsey. He obtained a PhD in Fluid and Thermodynamics, an MBA from INSEAD and working experience in Europe, North America and Asia. He has been a teaching Professor in the Physics and the Business departments at the Technical University of Munich for 7 years. Since 2005 Honorary Professor at Tsinghua University in Beijing, China. Co-author of several books and is a regular contributor to the World Economic Forum and the leading business press. Research Partner for Asian and especially Chinese equities for ACATIS KVG mbH.

Alice Wang

Portfolio Manager of the funds QCF (Lux) – Bamboo and QCF (Lux) – China, QUAERO CAPITAL

Alice Wang, CFA, manages the QCF (Lux) – Bamboo and the QCF (Lux) – China funds at Quaero Capital LLP in London. She is a frequent commentator on broader investment trends in China and across Asia and she has been published widely across the global financial media.

Previously, she worked for Lloyd George Management (HK) Limited, where she was already responsible for the Bamboo fund (Asia ex-Jp). She began as a China specialist, and her scope expanded to South Korea, Taiwan and Philippines, with a particular focus on technology, healthcare, and consumer sectors. She is co-author of a multi-year case study on Haier Electronics for London School of Economics.

Alice graduated from Yale University with a BA in Humanities focusing on Chinese Intellectual History. She was born in China and is a native Mandarin speaker.

Harry Büsser

CFA, Member of the editorial board at Handelszeitung and editor-in-chief of Millionär magazine

Harry Büsser is a member of the editorial board at Handelszeitung and editor-in-chief of Millionär magazine. He studied at the University of St. Gallen and completed his master's degree with a specialization in risk management. He is a CFA Charterholder.

In his professional career he has been a journalist for more than 20 years, working for Swiss television's Tagesschau and the business magazine Bilanz, among others. He has won five journalism awards, including being the first Swiss ever to win the StateStreet award for the best analytical story by a financial journalist in any German-speaking country - story about high frequency trading and dark pools. Just in 2021 he won the award for quality in journalism in the tv and video category for his video series "Harrys Homeoffice".