

Morningstar Advisor Forum, Kolkata– 10th July 2018 @ The Lalit Great Eastern Hotel

Agenda	
2:00-2:30 PM	Registration and Refreshments
2:30-2:45 PM	About Morningstar
2:45-3:15 PM	Finding Investment Opportunities in an Uncertain Investing World Our research indicates that valuation driven asset allocation approach assists in finding investment opportunities in an uncertain investing world. It is our belief that valuation is not only relevant at the security level; but it is equally important at the asset-class level. When describing this, it helps to think about valuation-driven asset allocation as bottom-up asset allocation, which involves adjusting the exposure to asset classes based on valuation through time. Valuation-driven asset allocation requires a fundamentally derived fair value or valuation anchor for each asset class and comparing current price with this estimate of fair value is at the heart of valuation-driven investing.
3:15-3:30 PM	Tea/Coffee Break
3:30-4:00 PM	Selecting the right funds for investors: A Morningstar Perspective Given the plethora of options out there, it's difficult for an adviser to pick the right set funds for a particular client's portfolio. We illustrate Morningstar's Fund Analysis & Ratings and how it can go a long way in helping an adviser pick the most suitable funds from the wide universe available.
4:00-4:45 PM	Demonstrating the value of advice When a client's portfolio is doing well, the market is given credit for it. When the portfolio is down, clients tend to pin the blame on their adviser. Demonstrating the value of advice is truly a challenge for most advisers. Morningstar® Adviser Workstation™ supports advisers with the latest investment data, tools, and reports to serve existing clients and generate new business. This presentation illustrates how you can use AWS to demonstrate the value of your advice to clients.
4:45 PM onwards	Networking Hi - tea
* Agenda is subject to change	