

# Morningstar Direct Forum, Mumbai

30 July, Jio World Convention Centre

| Time                | Tuesday, 30 July                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
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| 9:30 am – 10:00 am  | Registration & Networking Breakfast                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 10:00 am – 10:05 am | Welcome Note                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| 10:05 am– 10:50 am  | <b>Managing Risk in Investment Portfolios.</b><br><br><i>Risk is inherent to investing. Developing a holistic view of risk allows investors to make investment decisions tailored their individual risk preferences and ultimately increase the utility derived from their investment portfolios</i><br><br><i>Kaustubh Belapurkar, Director of Manager Research, Morningstar</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 10:50 am– 11:30 am  | <b>Panel Discussion: Managing Multi Asset Portfolios.</b><br><br><i>Efficient Portfolio Construction is crucial to meeting client's investment needs. Key stages including identifying suitable assets, analyzing associated risks, implementing a suitable asset allocation strategy, choosing a solid management approach, making mindful investments, and ensuring consistent monitoring for portfolio performance optimization are aimed at delivering an optimal outcome within a pre-determined risk framework. We speak with experienced practitioners to discuss their portfolio construction framework and tools they use to achieve the same.</i><br><br><i>Gaurav Doshi, 360 One Wealth; Siddharth Pardesi, IndusInd Bank; Roopali Prabhu, Sanctum Wealth Moderated by: Kaustubh Belapurkar</i>                                                                                         |
| 11:30 am– 11:45 am  | Tea Break                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 11:45 am – 12:15 pm | <b>Multidimensional portfolio analysis aided through investment strategy aligned indexes.</b><br><br><i>In today's market, accurate information is essential for investors. Morningstar provides leading solutions to help advisors make better decisions and communicate effectively with clients. Join us to learn how to align the right benchmarks with your investment strategy using objective metrics. With over 200 strategies across various asset classes, our indexes offer insights to enhance returns and manage risk. Using Morningstar Direct and Morningstar Indexes, we'll demonstrate how to gain deeper insights into client portfolios and ensure proper alignment with their goals. Plus, learn to create visually compelling reports to clearly communicate performance and strategy.</i><br><br><i>Pankaj Parmar, Director, Quantitative Research, Indexes, Morningstar</i> |
| 12:15 pm – 12:45 pm | <b>Experiencing Morningstar Direct</b><br><br><i>Walk through of the power of our data, research, and analytics. We will give you a multifaceted view of data powered by our research platform, so you can make decisions with less friction and leave behind time-consuming processes.</i><br><br><i>Samir Ayir, Customer Success Team Lead, Morningstar</i>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

Morningstar Direct Forum Agenda

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| Time             | Tuesday, 30 July |
| 12:45 pm Onwards | Networking Lunch |

\*Agenda is subject to change