

Morningstar Investment Conference India

2025 Agenda* - Tuesday, 04 November

Venue: Jasmine Hall 2, Jio World Convention Centre, Mumbai

8:30am - 9:30am (IST)	Registration and Breakfast	
9:30am - 9:35am (IST)	Welcome Address	Mohit Aggarwal, Morningstar
9:35am - 9:55am (IST)	Opening Remarks	Kunal Kapoor, Morningstar
9:55am - 10:25am (IST)	Interest Rate Dynamics and Implications for Financial Markets A speech by Shri T. Rabi Sankar, Deputy Governor	Shri T. Rabi Sankar, Deputy Governor, RBI
10:25am - 10:45am (IST)	Navigating Evolving Market Dynamics: Role of Financial Intermediaries in Strengthening Investor Protection and Market Integrity A speech by Tuhin Kanta Pandey - Chairman, SEBI	Shri Tuhin Kanta Pandey - Chairman, SEBI
10:45 am – 11:10am (IST)	Networking Refreshment Break Stretch your legs, grab a snack, and head to the Morningstar Theatre for insightful sessions featuring our ‘Meet the Managers’ series.	
10:50 am – 11:05 am (IST)	Meet the Manager: Inside the ETF Engine: Things to know Morningstar Theatre sessions – Exhibit Hall	Umesh Kumar Daila, Mirae Asset Investment Managers (India) Pvt. Ltd.
11:10 am - 11:45 am (IST)	Presentation: Geopolitical Crosswinds: Safeguarding Indian Portfolios in an Age of Rapid Macro Economic Shifts Wars, tariffs and safe-haven spikes are reshaping global capital flows. Hear the economics expert decode how geopolitical crosswinds are reshaping macro dynamics and what they could mean for key asset classes and Indian investment landscape.	Samiran Chakraborty, CitiGroup Himanshu Srivastava (Moderator)
11:45 am - 12:35 pm (IST)	Panel: India’s Specialized Investment Funds Landscape and Rise of Semi Liquid Alternative Strategies Globally The panel discussion is centred SEBI’s new product class on the Specialized Investments funds and the opportunities it presents for investors. We will also share perspectives on the growth of semi liquid alternatives across global markets.	Andrew Holland, Nippon India Mutual Fund Laura Lutton, Morningstar Nandik Mallik, Axis Mutual Fund Radhika Gupta, Edelweiss Mutual Fund Kaustubh Belapurkar (Moderator)

Morningstar Investment Conference India

2025 Agenda* - Tuesday, 04 November

Venue: Jasmine Hall 2, Jio World Convention Centre, Mumbai

12:35 pm – 1:20 pm (IST)	Panel: Future Forces: What Will Shape Equity Markets Through 2030 As powerful structural forces reshape equity markets, from evolving sector dynamics to shifting valuation anchors - hear from experts as they decode the durable trends that hold the key to identifying long-term opportunity and distinguishing signal from short-term noise.	Prashant Jain, 3P Sankaran Naren, ICICI Prudential Sunil Singhania, Abakkus Asset Manager Private Limited Ajay Bagga, Elyments Platforms (Moderator)
1:20 pm – 2:20 pm (IST)	Lunch Break Morningstar Theatre Sessions – Exhibit Hall Featuring Meet the Manager Sessions and the Shaping Your Practice session by Morningstar Lunch and networking continue alongside sessions at the Morningstar Theatre featuring 'Meet the Managers' and Shaping Your Practice session by Morningstar.	
1:20 pm – 1:40 pm (IST)	Shaping Your Practice Session: Presentation: Role of Gold in an Investors Portfolio Gold has experienced considerable investor interest and sustained price appreciation in recent years, driven by a combination of macroeconomic, structural, and geopolitical factors. How should investors look to allocate to gold, we discuss the allocation to gold in multi asset portfolio and the various avenues available to access gold exposure.	Kaustubh Belapurkar, Morningstar
1:40 pm – 1:55 pm (IST)	Meet the Manager Presentation: Investing in the age of AI: Global Perspectives Morningstar Theatre sessions – Exhibit Hall	Satish Betadpur, State Street
2:00 pm – 2:20 pm (IST)	Shaping Your Practice Session: Presentation: Realize Your Investment Vision with Morningstar Direct 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.	Shahid Shaikh, Morningstar
2:20 pm – 2:50 pm (IST)	Presentation: Intelligence Unbound: Living, Thinking, and Advising in the Age of AI AI is no longer an experiment. It is the engine that is transforming how financial institutions and advisors operate and serve their clients. From automating tasks and uncovering insights to enhancing compliance and personalization, AI is redefining efficiency and trust in India's BFSI sector while driving innovation across global markets. It's reshaping investment research, analytics, and investor engagement, bridging the gap between data, intuition, and technology closer than ever. Join us in this session as we unpack how this new frontier is redefining advice and the future of wealth.	Sonali Kulkarni, Microsoft India & South Asia Kongkon Gogoi, Morningstar (Moderator)
2:50 pm - 3:40 pm (IST)	Panel: Recalibrating Bonds: Risks, Yields, and Opportunities With the fixed income landscape in flux, understanding yields, credit conditions, and duration risk is key to navigating what comes next in the market cycle.	Rakshat Kapoor, Motilal Oswal Alternates Rajeev Radhakrishnan, SBI Funds Management Pvt. Ltd

Morningstar Investment Conference India

2025 Agenda* - Tuesday, 04 November

Venue: Jasmine Hall 2, Jio World Convention Centre, Mumbai

Shobhit Mehrotra, HDFC Mutual Fund
Vishal Goenka, IndiaBonds
Nehal Meshram (Moderator)

3:40 pm -
4:05 pm (IST)

Networking Refreshment Break

Stretch your legs, grab a snack, and head to the Morningstar Theatre for insightful sessions featuring our 'Meet the Managers' series.

3:45 pm -
4:00 pm (IST)

Meet the Manager

SMALLCAP SURGE: Time to Fear or Accumulate?

Morningstar Theatre sessions – Exhibit Hall

Varun Goel, Mirae Asset Investment
Managers (India) Pvt. Ltd.

4:05 pm -
4:40 pm (IST)

Investing when the only certainty is uncertainty

The global investment landscape today is shaped by uncertainty and transition. Investors face a complex mix of opportunities and risks, influenced by geopolitics, trade, and monetary policy. We discuss how the global economic landscape is changing, the key factors to focus on while investing and how to invest in the current investing landscape.

Mike Coop, Morningstar

Himanshu Srivastava (Moderator)

4:40 pm -
5:15 pm (IST)

Resilience in the Face of Adversity

Success is rarely a straight line, it's built on the ability to recover, adapt, and keep moving forward when challenges strike. In a world defined by uncertainty, true strength lies in remaining composed, thinking with clarity, and persevering through difficulty. Resilience and self-belief transform setbacks into opportunities for renewal and lasting success.

Paddy Upton, Leadership Coach

Kaustubh Belapurkar (Moderator)

5:15 pm -
6:15 pm (IST)

Panel: Across the Market Map: Navigating the Crosscurrents in Indian Equities?

A surge in IPOs, rising enthusiasm for small- and mid-cap stocks, and periodic governance lapses are putting fresh focus on risk, valuation, quality, and raising timely questions about where sustainable value may emerge.

Harish Krishnan Aditya Birla Sun Life

Niket Shah, Motilal Oswal

Taher Badshah, Invesco

Madhusudan Kela, MK Ventures
(Moderator)

6:15 pm -
6:20 pm (IST)

Closing Remarks

Mohit Aggarwal, Morningstar

*Agenda is subject to change