

16th Mutual Fund Summit

“Unlocking the Potential: Exploring Investment Opportunities for Viksit Bharat”

August 9, 2024 – Hotel Le Meridien, New Delhi

Chief Guest



Shri Ananth Narayan Gopalakrishnan
Whole Time Member
Securities & Exchange Board of India (SEBI)

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The Associated Chambers of Commerce & Industry of India (ASSOCHAM)



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In today's volatile market environment, mutual funds are looked upon as a transparent and low cost investment vehicle, which attracts a fair share of investor attention promoting the growth of the industry. The Indian mutual fund industry is one of the fastest growing and most competitive segments of the financial sector. The robust market performance over the past few months helped investors renew faith in stock market.

As per AMFI, the MF Industry's AUM has grown from Rs. 24.79 trillion as on April 30, 2019 to Rs. 57.26 trillion as on April 30, 2024, more than 2 fold increase in a span of 5 years. As of April 2024, the average assets under management (AAUM) stood at Rs. 57.01 Trillion. SIP flows in January 2024 touched a record Rs.18,838 Crore while the NFO (new fund offering) flows were relatively strong at Rs. 6,817 Crore, dominated by passive funds and multi-asset allocation hybrid funds.

There were significant inflows into equity funds, sector-based funds, and gold ETF schemes indicating a bullish trajectory; however, debt funds recorded a marked reduction. The inflow patterns reveal a clear shift towards equity and sector-specific investments, while debt funds saw a significant decline. This suggests a growing investor appetite for higher returns and a strategic focus on diversified and thematic investments. The resurgence of interest in GOLD ETFs also indicates a cautious approach amidst global economic uncertainties.

There is need to encourage small investors to either invest through Mutual Fund mechanisms, or take investment decisions only after getting adequate information about risks and rewards. As the industry sensitizes itself to the changing regulatory landscape, business strategies are gearing to respond to these developments. Amidst this changing business and regulatory environment, Asset Management Companies and all service providers, including distributors, have to re-examine their business models and embrace the changing business landscapes.

The objective of the program is to encourage a greater number of people to participate in the corporate economy through various investment instruments. The deliberations will focus on reaching out to investors and to familiarize them with the basic fundamentals of investment and risk management and their rights and responsibilities, and to build confidence among them to invest in government as well as corporate securities, so that not only the corporate markets grow but so does the Indian economy.

Therefore, in order to discuss these aspects further in mutual fund industry and to discuss best investment practices and investors' protection, **ASSOCHAM is organizing 16th Mutual Fund Summit at 9:30 a.m. on August 9, 2024 at Hotel Le Meridien in New Delhi.** There will be a large participation by the stakeholders including the Government officials, Asset Management Companies, Banks and Financial Institutions, Corporate houses, Tax consultants, Prime Brokers, FII's, HNIs and Investors to name a few.





Key Issues for Discussion

- ⊙ An outlook of Mutual Fund Industry
- ⊙ The Investment pattern of HNIs, FIIs
- ⊙ Salient features/ traits to becoming a smart investor
- ⊙ Market Volatility Management: Understanding Risks Associated with Mutual Fund Investment.
- ⊙ Understanding Market Dynamics and Regulatory Updates for sustaining long term growth.
- ⊙ Market Outlook: Trends and Predictions
- ⊙ Innovations in Mutual Fund Industry and Investor Education
- ⊙ Protecting & promoting interest of Investors.
- ⊙ Technological Integration of Distribution & Delivery Channels.
- ⊙ Role of Financial Planning - Awareness, Product Customization & Distribution
- ⊙ Distribution challenges, Strategies and Regulations in Indian Mutual Fund Industry
- ⊙ Mutual Fund Investors Perceptions and Preferences
- ⊙ Mutual Funds: Trading practices and abuses that harm investors.
- ⊙ Challenges of Mutual Fund Industry: Reaching out to retail investors
- ⊙ Internal and External Factors in Mutual Funds Performance.
- ⊙ International Diversification and Distribution.
- ⊙ Portfolio Allocation, Risk and Performance Evaluation of Mutual Funds.
- ⊙ Global Mutual Fund Investing: Using Funds to Investment decision.
- ⊙ Evolving Principles of Fund Governance
- ⊙ Marketing Funds through Distribution Channels
- ⊙ Competition for Mutual Funds from New Collective Investment Vehicle
- ⊙ New Funds and Distribution Structures in Asia
- ⊙ Role of an Intermediary in Mutual Fund Sales
- ⊙ Asset Allocation - The model that suits the Investor
- ⊙ Mutual Fund - Basics Structure, Standards & Disclosures, Portfolio Diversification
- ⊙ Maximizing Mutual Fund Web Trading
- ⊙ The Future of Fund Management
- ⊙ Sustaining Investor Confidence in Mutual Funds.
- ⊙ Mutual fund performance and fund ratings

Participants Profile

- ⊙ Asset Management Companies
- ⊙ Indian and Multinational Banks
- ⊙ Domestic & Foreign Financial Institutions
- ⊙ Foreign Institutional Investors
- ⊙ Large & Medium Corporate Houses
- ⊙ Software Solution Companies
- ⊙ BFSI Consultants
- ⊙ Corporate Investors
- ⊙ High Net worth Individuals
- ⊙ Asset Managers/Portfolio Managers
- ⊙ Lead Managers
- ⊙ CFO's, CEO's & CIO's
- ⊙ Compliance Officers
- ⊙ Investment Advisors
- ⊙ Corporate Trustees
- ⊙ Distributors
- ⊙ Government Officials and regulators
- ⊙ Fund Managers
- ⊙ Investment/Research Analysts
- ⊙ Financial Planners and Independent Consultants
- ⊙ Insurance and other service providers
- ⊙ Tax and Accounting Executives
- ⊙ Prime Brokers

Invited Eminent Speakers From

- ⊙ SEBI
- ⊙ Ministry of Finance
- ⊙ Ministry of Corporate Affairs
- ⊙ Reserve Bank of India (RBI)
- ⊙ Association of Mutual Funds in India (AMFI)
- ⊙ Mutual Fund Houses
- ⊙ Indian and Multinational Banks
- ⊙ Advisors and Fund Managers
- ⊙ Distribution Houses
- ⊙ Research Organizations
- ⊙ Financial Institutions
- ⊙ Foreign Institutional Investors
- ⊙ Large and Medium Corporate Houses
- ⊙ Consulting and Rating Agencies

Sponsorship Opportunities

The Summit provides an excellent opportunity for organizations/companies to promote their product & services to the focused audience besides networking during tea/coffee and lunch intervals. The sponsorship details are as under:

Summit Partner: Rs. 15 Lakhs

- Status of 'Summit Partner' and the Partner's name and logo will be prominently displayed at the Summit venue.
- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding in event brochure.
- Speaker Slot to a company representative in Inaugural session & Technical session.
- Corporate Video Play at Summit during the Tea and Lunch Break (4 min only).
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in ASSOCHAM's Social Media Platform.
- Acknowledging sponsor name during the event
- Complimentary exhibition space (Stall measuring 2 x 2 mtr) at the Summit venue.
- Insertion of Company's brochure into the documentation pack.
- 15 Complimentary Passes to attend the Summit.

Principal Sponsor: Rs. 10 Lakhs

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding in event brochure.
- Speaking opportunity as Panellist in any of 2 Technical Session.
- Corporate Video Play at Summit during the Lunch Break (3 min only).
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- Complimentary exhibition space (Stall measuring 2 x 2 mtr) of at the Summit venue.
- Insertion of Company's brochure into the documentation pack.
- 10 Complimentary Passes to attend the Summit.

Technology/Banking/ Innovation Partners: 7 Lakhs

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding in event brochure.
- Speaking opportunity as Panellist in any one Technical Session.
- Corporate Video Play at Summit during the Tea/Coffee Break (2 min only).
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- Complimentary exhibition space of at the Summit venue.
- 7 Complimentary Passes to attend the Summit.

Co-Sponsor: Rs. 5 Lakhs

- Branding of company logo at the main backdrop at the Summit Venue.
- Branding of company Logo in newspaper advertisement.
- Logo branding on the event Mailers.
- Logo branding in Thank you panel at the Summit Venue.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- Insertion of Company's brochure into the documentation pack.
- 5 Complimentary Passes to attend the Summit.

Supporter: Rs. 2 Lakhs

- Logo visibility on event Backdrop.
- Logo in newspaper advertisement.
- Logo branding in Thank you panel at the Summit Venue.
- Logo branding on the event Mailers.
- Logo on the ASSOCHAM event Webpage.
- Branding in Social Media Platform.
- 3 Complimentary Passes to attend the Summit.

Note: It is imperative that Partner/ Sponsorship details and Advertisement material are received by us latest by **July 31, 2024**. The support options are strictly on first cum first served basis.

Participation Fee: Rs.3,000/- (Including GST)

For further details please contact:

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