



Wednesday, September 3			Pudong Shangri-la, The River Wing, Shanghai			Open to media
8:15 AM	Registration (Breakfast will be served)					
8:50-9:00 AM	Grand Ballroom, River Wing, Level 3					
	Welcome Remarks * Mr. Minoru SHINOHARA, CEO, Asia ex-Japan, Nomura					
9:00-09:50 AM	Keynote: Financial Innovation and Development of Shanghai Pilot Free Trade Zone * Mr. LI Jun, China (Shanghai) Pilot Free Trade Zone Administration Deputy Secretary-General Moderator: Mr. SHEN Hong, Shanghai Bureau Chief, The Wall Street Journal and Dow Jones Newswires					
10:00-10:50 AM	Presentation: China under Xi Jinping: the changing landscape of elite politics and reforms Professor ZHENG Yongnian, Professor and Director of East Asian Institute, National University of Singapore Moderator: Dr. ZHU Wen Hui, Senior research fellow, Bauhinia Foundation, Research Centre, Anchor and Commentator on Phoenix TV Panelist: Ms. Wendy LIU, Head of China Equity Research, Nomura					
10:50-11:00 AM	Morning Refreshments					
11:00-11:50 AM	Changan Room, River Wing, Level 3		Suzhou Room, River Wing, Level 3			
	Panel discussion: How do we soft land an asset bubble? Moderator: Ms. Wendy LIU, Head of China Equity Research, Nomura Panelists: Mr. Jin CAI, Vice President ,China Federation Logistics & Purchasing Mr. Liqun ZHANG, Senior Research Fellow of Macro Economic Research Department, DRC Mr. Peng ZHANG, Senior Research Fellow, Ministry of Finance		Panel discussion: China’s natural gas transformation – winners & losers Moderator: Mr. Gordon KWAN, Regional Head of Oil & Gas Research, Equity Research, Asia ex-Japan, Global Markets, Nomura Panelists: Mr. Jack FANG, Director, Hans Energy Mr. Zefeng MAO, Joint Company Secretary, PetroChina Company Limited Mr. Colin SHEK, China editor for Interfax Energy, and Shanghai bureau chief for Interfax			
12:00-1:20 PM	Grand Ballroom, River Wing, Level 3					
	Lunch Keynote: Out of the Balance Sheet Recession and into a QE ’Trap’ * Mr. Richard KOO, Chief Economist, Nomura Research Institute					
1:30-2:20 PM	Changan Room, River Wing, Level 3		Suzhou Room, River Wing, Level 3			
	Presentation: Demographic challenges in China - Lessons from ABENOMICS Mr. Kosuke MOTANI, Chief Senior Economist, Economist Department, Japan Research Institute, Ltd and Senior Advisor, Regional Planning Department, The Development Bank of Japan, Ltd		Presentation: What China should do in the environmental industry from the experience in Japan on the road of environmental protection? Mr. Shoji ONOGI, President, Japan-China Environment Service Center Moderator: Mr. Joseph LAM, Power, Utilities & Renewables Energy, Equity Research, Nomura			
2:30-3:20 PM	Panel discussion: China’s aging society and its implications Moderator: Ms. Emma LIU, Head of China Consumer Research, Asia ex-Japan / China, Hong Kong, Nomura Panelists: Mr. Yu ZHAO, Group Deputy General Manager, Fushouyan Mr. Di LU, The Board Office Senior Manager, Shanghai Pharmaceutical		Panel discussion: Online education - a replacement or supplement to physical learning center? Moderator: Mr. Chao WANG, China Media/Internet, Hong Kong, Nomura Panelists: Mr. Zhuoming HUANG, Education Expert, Ex-EDU Mr. Kingson LIU, Founder, enhance.cn Mr. Jack HUANG, Founder, Xuexibao			
3:20-3:30 PM	Afternoon Refreshments					
3:30-4:20 PM	Panel discussion: Outlook on China property sector - are we at a turning point? Moderator: Mr. Jeffrey GAO, Head of China Property Research, Nomura Panelists: Mr. LIU Yuan , Vice President (Property Research), Centaline Group Mr. Liqun ZHANG, Senior Research Fellow of Macro Economic Research Department, DRC Mr. Joe ZHOU, Head of Research, Shanghai and East China, Residential Market. JLL		Presentation: Home revolution – Opportunities in Eco-Smart Home Moderator: Mr. Joseph LAM, Power, Utilities & Renewables Energy, Equity Research, Nomura Panelists: Mr. Alessandro BISAGNI, Founder & Managing Director, Bisagni Environmental Enterprise Mr. Shawn QU, CEO, Canadian Solar Mr. Xin Cong ZHU, Vice President, U-Home (Smart Home Unit of Haier Electronics)			
	Panel discussion: Mobile gaming - blue ocean or red sea? Moderator: Mr. Chao WANG, China Media/Internet, Hong Kong, Equity Research, Nomura Panelists: Mr. Tao HONG, Founder, Gamelook Mr. Quaxin SUN, VP, Mokylin Mr. Hang ZENG, Director of Strategic Analysis, Chukong Technologies Inc. Co., Ltd, Author of Mobile Empire		Presentation: China and Semiconductors - Brave New World or Same Old Story? Mr. Christopher THOMAS, Senior Advisor, Asia Leadership Team, McKinsey & Company Moderator: Mr. Leping HUANG, China Technology and Telecom Research, Asia ex-Japan, Nomura			



Thursday, September 4		Pudong Shangri-la, The River Wing, Shanghai	
8:30 AM	Registration (Breakfast will be served)		
09:00-9:50 AM	Grand Ballroom, River Wing, Level 3		
	Keynote Address: Thoughts on reforms of the Chinese financial system Mr. Xiqing GAO, Professor, School of Law, Tsinghua University and Former Vice-Chairman and President, China Investment Corporation Moderator: Mr. Michael KURTZ, Chief Asia Equity Strategist and Global Head of Equity Strategy, Nomura		
10:00-10:50 AM	Changan Room, River Wing, Level 3	Suzhou Room, River Wing, Level 3	
	Presentation: Challenges of Chinese retail market Mr. Tomihiro SAEGUSA, Head of China Operations, Ito Yokado Moderator: Ms. Emma LIU, Head of China Consumer Research, Asia ex-Japan / China, Hong Kong, Nomura	Presentation: The future of China’s mobile carriers Mr. Andy TAO, Vice Director, Senior Consultant for NRI, Telecom Team Moderator: Mr. Leping HUANG, China Technology and Telecom Research, Asia ex-Japan, Nomura	
10:50-11:00 AM	Morning Refreshments		
11:00-11:50 AM	Presentation: The bottlenecks in the development of electric vehicle and energy storage station in China Professor Chengwei XIAO, Head of Electric Battery Material Taskforce, National 863 Project Moderator: Mr. Leping HUANG , China Technology and Telecom Research, Asia ex-Japan, Nomura	Panel discussion: Innovative online marketing solution to target more precise audience Moderator: Mr. Chao WANG, China Media/Internet, Hong Kong, Nomura Panelists: Mr. Simon WANG, VP, AdChina Mr. Eric WENG, Managing Director, Client Solutions, Carat	
	Grand Ballroom, River Wing, Level 3		
12:00-1:20 PM	Lunch Keynote: Shanghai-Hong Kong Stock Connect Mr. James FOK, Chief of Staff, Head of Group Strategy, Hong Kong Exchanges and Clearing Limited Ms. Lisa YingYing LI, Manager, Global Business Development, Shanghai Stock Exchange Moderator: Ms. Wendy LIU, Head of China Equity Research, Nomura		
	Changan Room, River Wing, Level 3	Suzhou Room, River Wing, Level 3	
1:30-2:20 PM	Panel discussion: China’s Changing Banking Landscape: Challenge and Opportunity Moderator: Mr. Michael KURTZ, Chief Asia Equity Strategist and Global Head of Equity Strategy, Nomura Panelists: Ms. Jennifer QIN, Lead Partner, Deloitte Asia Pacific Investment Management industry practice and co-leader, Deloitte China Global Financial Services Industry banking and securities audit practice Mr. Simon RABINOVITCH, Asia Economics Editor, The Economist Dr. ZOU Xin, Deputy General Manager of Corporate Strategy and Investor Relations, ICBC	Presentation: Online is the new Black - The impact of ecommerce on China’s retail real estate sector Mr. Michael KLIBANER, Regional Director, Head of Research – Greater China, JLL Moderator: Mr. Jeffrey GAO, Head of China Property Research, Nomura	
	Panel discussion: Future of industrials sector driven by automation Moderator: Ms. Caren HUANG, Analyst, Machinery, Taiwan Equity Research, Nomura Panelists: Mr. Johnny HUANG, Analyst, Mechanical and Manufacturing Systems in Industrial Economics & Knowledge Centre (IEK), Industrial Technology Research Institute (ITRI) Mr. Wei WANG, Vice chief editor, Robot Technique and Application magazine	Presentation: Auto demand outlook from a regional perspective and auto financing boom Mr. John ZENG, Managing Director, LMC Moderator: Mr. Benjamin LO, Autos & Auto Parts, China, Research, Asia ex-Japan, Nomura	

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The agenda is subject to changes.

Speaker biographies are available at <https://www.nomura.com/events/china-investor-forum>