

Monday, 21st August, 2023

Oberoi 360 West, Mumbai

Pre Forum Reception
(Exclusive for Campden members)

Tuesday, 22nd August, 2023

St. Regis Hotel, Mumbai

Indian Family Alternative
Investment Forum

Wednesday, 23rd August, 2023

MCA Club, Mumbai

Co-Investment Workshop

THE 5TH INDIAN FAMILY ALTERNATIVE INVESTMENT FORUM

Investing with Agility in a Dynamic World



In a rapidly changing world, successful investing requires agility and adaptability. The theme, "Investing with Agility in a Dynamic World," reflects the need for investors to navigate through evolving market conditions and seize opportunities. Through discussions on alternative investments, AI, healthcare sector, private debt and more, the conference will equip attendees with the insights and knowledge to make agile investment decisions, capitalize on emerging trends, and stay ahead in an ever-evolving investment landscape.



NITIN THAKOR
Founder and Chairman
GeBBS Healthcare Solutions

FORUM CHAIRPERSON

Nitin is a widely recognized thought leader and trend spotter in healthcare, he continues to forge new inroads into innovation and champion value-driven, technology-enabled solutions. He provides strategic leadership in the key areas of Board Governance & Effectiveness and Mergers & Acquisitions. He is graduated in Finance & Economics from University of Texas and is an alumnus of the Harvard Business School. He is the winner of the 2020 Ernst & Young Entrepreneur of the Year® Award.

FEATURED SESSIONS

THE CURRENT STATE AND FUTURE OF ALTERNATIVE INVESTMENTS IN INDIA

The world of alternative investments is rapidly evolving, and India is not far behind in this changing landscape. With the increasing volatility and uncertainty in the global markets, alternative investments have gained prominence as a means to diversify and minimize return risks. This session will discuss the future outlook of alternative investments in India, including the emergence of new investment avenues and the potential impact of regulatory changes on this sector.

MODERATOR



AMITABH CHAKRABORTY
Kitara Capital



GAUTAM SEHGAL
Patni Financial Advisors



NITAI UTKARSH
Hero Motocorp



SIDDHARTHA SARAF
Manyavar Family Office

VOLATILITY IS NOT RISK

Risk and Volatility are often mistakenly used interchangeably even by seasoned investors and advisors. While stock prices exhibit swift and substantial fluctuations due to real-time trading, the fundamental business they represent does not undergo any dramatic change within the same time. Whether the change is for better or worse, it lacks the immediate magnitude to substantially impact overall business outcomes. The session discusses this key difference between risk and volatility when investing in the equity markets and will give valuable insights for families to enhance their investment strategies.



YOGESH THAKKAR
Karma Capital

THE DISCIPLINE IN CHAOS

Gain valuable insights into the art of making money in today's dynamic investment landscape. The session will elaborate on the investment framework, rationale for concentration, and the track record of mid/small and micro-cap space. The expert speaker will also provide valuable pointers on the outlook and depth of this space, offering crucial insights to aid in building resilient portfolios



ANIRUDDHA NAHA

PGIM India Asset Management

THE AI REVOLUTION: INVESTING IN THE FUTURE OF TECHNOLOGY

Artificial intelligence (AI) is transforming various industries and is expected to have a significant impact on the future of business. Investing in AI offers unique opportunities for investors to capitalize on the growth potential of this emerging technology. This session will explore the latest trends and advancements in AI, opportunities to invest, and the potential risks and rewards of investing in this space. We will discuss the impact of AI on different sectors and examine the role of AI in portfolio diversification.



AVIK SARKAR

Indian School of Business



DR. SUNIL KUMAR VUPPALA

Fellow IEI and IETE

GOING GLOBAL: WHY THE US IS STILL THE MOST RELEVANT DESTINATION FOR THE NEXT GENERATION

For business families and family offices, understanding the importance of the United States as an influential destination for the next generation is key. This session explores the compelling factors that make the US the most relevant choice for wealthy families, providing real-world insights to shed light on its enduring prominence.

Session highlights:

- India's increasing collaboration with the US; India replacing China in the world order
- Case Studies from families, their learnings and best practices
- How a family office can inspire and support the next generation
- Residency and other services in the US that could give family members an advantage



SHERMAN BALDWIN

LCR Capital Partners

VENTURE DEBT: NAVIGATING THE ALTERNATE FRONTIER OF VENTURE FINANCING

Venture debt has evolved into a formidable financing option for early to growth stage startups. Despite witnessing significant growth, the venture debt market in India still accounts for less than 5% of the Venture Capital equity funding market, in contrast to more developed markets like the US, where it represents around ~10%. This session explores the alternate frontier of venture financing, shedding light on the opportunities and challenges it offers. Gain valuable insights into the potential benefits and strategies for integrating venture debt into your venture capital plan.



ANKIT AGARWAL
Alteria Capital

THE CONVERGENCE OF GMT (GENERATIONAL SHIFT, MARKETS & TECHNOLOGY): WHAT IT MEANS FOR INDIA'S FAMILY OFFICES.

Family offices globally are now seeing representation from the next-gen at the decision table. They bring their own expectations and value systems, which are proving challenging to manage. Add to that the ample investment opportunities along with higher inflation and the volatile rates environment. Technology has always evolved, but the pace of change is leading to disruption and new opportunities unknown before. As this (GMT) global phenomenon converges simultaneously, the future will be challenging yet full of new opportunities. Are family offices in India poised to make this shift? Know the right tools that can help you take advantage of this phenomenon.



VIGNESH R S
Bloomberg Singapore

IS INVESTING IN INDIA'S HEALTHCARE SECTOR THE PRESCRIPTION FOR BETTER RETURNS?

MODERATOR



DR. SANJAY ARORA
Suburban Diagnostics
Shubhan Ventures



APOORVA PATNI
Currae Healthcare



ASHUTOSH TAPARIA
Ananta Capital



NIHAR PARIKH
4point0 Health Ventures

India's healthcare sector has been one of the focus areas for the government, with major reforms and investments being made in recent years. This session will bring together experts and investors to share their insights on the opportunities and risks of investing in India's healthcare sector. This session will explore the latest trends, market dynamics, and regulatory developments, and discuss how investors can navigate the complex landscape to maximize their returns. The panel will also share their experiences and success stories in investing in the sector, providing practical tips and strategies for family offices and large investors looking to invest in this space.

THEMATIC ROUND TABLE DISCUSSIONS

NAVIGATING THE RISKS AND OPPORTUNITIES IN PRIVATE EQUITY

Private Equity has been a long-standing interest for family offices and high net worth individuals in India. Many single family offices in India are investing directly in the private companies bypassing the PE funds. With changing market trends, the sectoral focus and expected returns have become crucial considerations for private equity investors. Discuss with your peers on investors' changing approach, emerging sectoral trends in the private equity market in India as well as best practices being followed for investment selection and portfolio management.

PRIVATE DEBT AS AN ALTERNATIVE TO FIXED INCOME

As fixed income continues to offer low returns, private debt has emerged as an attractive alternative investment option for investors. Discuss with your peers about how private debt can complement fixed income investments in a low yield environment and how other families are incorporating this asset class into their investment strategies to maximize returns.

REAL ESTATE INVESTMENT: NAVIGATING DOMESTIC AND GLOBAL MARKETS

Real estate has always been a popular asset class for wealthy families due to its potential for significant returns and stable cash flow. With the current global economic environment, investing in real estate has become even more attractive. Discuss with your peers on the current trends in real estate, which geographies are preferred by families for real estate investment and how are families looking at this asset class from long term perspective.

CO INVESTMENT WORKSHOP

Wednesday, 23rd August, 2023
MCA Club, Mumbai

We host the Co-investment Workshop on 23rd August. The workshop is chaired and brings together families, to discuss innovations, trends and challenges around direct & co-investing and we hear member backed deal opportunities for consideration.



SHASHWAT GUPTA
Director
Anukampa Group

CO-INVESTMENT WORKSHOP CHAIRPERSON

Shashwat hails from Rajasthan, where his family have been developing real estate under the aegis of Anukampa Group for over 46 years. He has worked with various financial firms like KPMG and Orios Venture Partners in the past. Currently, he manages the family office and is a Co-Founder at Spyre VC, a proptech focused VC fund with a targeted AUM of \$100M. With a focus on startups and equities, Shashwat is looking for opportunities that help build the nation over the next few decades.

REASONS TO ATTEND

- 1** Understand market dynamics and future trends for smart investing decisions
- 2** Discuss and debate investment strategies for the future.
- 3** Explore trends, geographies, and long-term view of real estate investment
- 4** Network with like-minded individuals and industry experts.
- 5** Stay updated on emerging trends and enhance investment knowledge
- 6** Gain insights on emerging sectoral trends in Indian private equity

THEMATIC NETWORKING ROUND TABLES

Tailor your meeting experience by attending a thematic roundtable. One of the new innovations for the Campden Family Connect's forums is an hour-long thematic networking session. Each provides the opportunity to choose a micro subject to share your knowledge and experiences, gain insight and seek guidance from your fellow community members.

PRE FORUM RECEPTION

An exclusive members-only evening, a pre-cursor to the Indian Family Alternative Investment Forum, this gathering offers members the opportunity to interact with peers in a relaxed and enjoyable setting and unwind before the forum. Members will explore their competitive spirit as they participate in an exciting game of bowling with fellow members.

CAMPDEN FAMILY CONNECT MEMBERSHIP

Campden Family Connect is the pre-eminent wealth membership network for multi-generational business owning families, families of substantial wealth and their family offices. By joining the campden club, you become part of our global community of over,1400 ultra-high net worth family members and their family offices, from over 43 countries. This is a private, qualified, invitation only, family member network.

Campden Family Connect Membership provides networking opportunities and unrivalled support to families,their next generation and senior executives through global and regional family wealth event, online communication with members around the world, Co-investment Workshops & Masterclasses, Women & Wealth/ NXG programs, member profiling, bespoke introduction & connections around aligned objectives, proprietary research report & data intelligence. To register your interest in Membership, please write to us at info@campdenfamilyconnect.com

REGISTRATION

For further information please contact:

✉ info@campdenfamilyconnect.com ☎ Phone: +91 84339 93963

Partners



Knowledge Partner



Supporting Partner

