
THE 7TH INDIAN FAMILY OFFICE FORUM

Evolving paradigms in the world of family offices



Themed on "Evolving paradigms in the world of family offices" this year's Family Office Forum will explore the short and long term reasoning family offices are employing to make key decisions. Through a series of panel discussions, keynotes and thematic round tables with peers, this forum will deliberate on the changing landscapes of family offices

Partners

DSP Investment Managers

Karma Capital

Beams Fintech Fund

Supporting Partner

The Phoenix Mills Limited

FORUM CHAIRPERSON



DR. AARTI GUPTA
DBR Ventures & Family Office of
D M Gupta, Jagran Group

Aarti is a member of the promoter family of the Jagran group, a business house with interests spanning across media & communications, education, real estate and hosiery exports. She heads the investment strategy for the family office and is the Chief Investment Officer at DBR Ventures, an angel investing entity that invests in smart and transformative early-stage start-ups. She is an investor on India's first reality start-up funding TV Show, Horses Stable. Named amongst the 22 Top Women Investors in the country by Inc42, she looks for companies with innovative and transformative solutions to problems that exist on a larger scale.

FEATURE SESSIONS

ROLE OF EFFECTIVE FAMILY-OFFICE GOVERNANCE

The dynamics of a large, complex family can be complicated for a number of reasons because of multiple businesses, equity structures, estates, global investments, foundations, trusts and other assets. With so much at stake, family office needs to approach decisions in a way that satisfies the diverse family members and that grows and safeguards wealth for future generations. That's where the effective governance comes in. This session will highlight how FO can implement effective governance, create guidelines for leadership transition and making family office independent.



PROF. SOUGATA RAY
Thomas Schmidheiny Centre
for Family Enterprise,
ISB Hyderabad



AMIT PATNI
Raay Global Investments &
Campden Family Connect



RISHABH MARIWALA
Sharrp Ventures
(Single Family Office)

THE OPPOSITE OF A GOOD IDEA CAN ALSO BE A GOOD IDEA

There are different approaches to investing & each can be right, at a point in time. This thought allows us to compare diversely opposite ideas and be open to diversity of thought to become a better investor



KALPEN PAREKH
DSP Investment
Managers Pvt. Ltd.

NARRATIVES AND NUMBERS

It's interesting how our biases let us ignore opportunities glaring in our eyes. Knowing the biases is the first step and practicing how to avoid them will help being a better manager. Over the years as an early cycle investors we have honed the skill to look at markets differently. Constructing portfolios different from street with a reasonable margin of safety.

In this session, Rushabh will share how over the years' time and again markets have played this behavioral anomaly of Investors and how as investors we have leveraged this anomaly. He will also share how to fight the cognitive dissonance while working with view which is contrary to street, contrary to research reports, Contrary to general perception and building own convictions. While not churning portfolios that often.



RUSHABH SHETH
Karma Capital

FAMILY OFFICES' GROWING INTEREST IN STARTUPS AND DIRECT INVESTMENTS

An increasing number of family offices in India are making direct investments in the rapidly growing startup sector. Some of the reasons are non-linear returns, attractive valuations, growing interest in unicorns, and direct exposure to technology firms. In this discussion, we will explore:

- Current market trends in this space
- Effects of global factors on family offices investing in venture capital
- Outlook for coming financial year



ANIRUDH DAMANI
Artha India Ventures
(Single Family Office)



AKSHAT CHAUDHARY
3 Peaks Ventures
(Pratibha Family Office)



PRIYA SHAH
RVS Family Office



DR. RUCHI DANA
Dana Group (UAE)

INDIA'S FINTECH MARKET: OPPORTUNITIES & CHALLENGES

Given that Fintech sector is the largest sector within the Tech space in India and Globally, it's important to understand the depth of this space. Businesses driven by Fintech use cases are expected to grow drawing investors' attention and funding as India's start-up landscape evolves. In this session, FinTech industry expert Sagar will highlight on importance of understanding valuations, growth and various business models within the Fintech space.



SAGAR AGARWAL
Beams Fintech Fund

LUXURY REAL ESTATE TRENDS

Luxury is not the same as before. From material to experience, the definition of luxury in real estate has changed with the changing lifestyle of the people. The pandemic, for instance, made us realise the importance of family, community, nature and above all, life. And our home is a reflection of all of this and more. So, what are the latest trends that define people's lifestyles, behaviour, and preferences? What is luxury in real estate today? In this session, industry expert Sunaina Kohli will highlight emerging real estate trends and spark a discussion on the meaning of luxury.



SUNAINA KOHLI
Phoenix Mills Ltd

CHANGING LANDSCAPES OF FAMILY OFFICES IN A DYNAMIC WORLD

Amidst rapidly changing economic, social, and geopolitical conditions, single family office & wealthy investor's strategic position has changed and evolved. Many are seeing the need to review scope, methods and best practices of risk management. In this session, Learn how family offices are updating their strategy in order to navigate the current global dynamics.



SONALI THAPAR
TCAP Investments
(Single Family Office)



AMOL SATHE
Thermax
Family Office



**PRINCESS JAHNAVI
KUMARI MEWAR**
Hukum Raj Legacy
JPM Capital



UMA KOLLAREDDY
Midwest Group

ROUND TABLE DISCUSSIONS

WHY FAMILIES ARE MOVING ABROAD AND SETTING UP FAMILY OFFICES?

This discussion focuses on understanding the key reasons why wealthy Indian families are moving abroad and where? How their experience is after the migration, benefits and should you consider.

INVESTMENT OPPORTUNITIES IN INDIA'S EMERGING SECTORS

Technological advancements and changing needs will drive the growth of sectors such as green energy, AI, clean mobility systems, genomics & pharma and more. Investments in sunrise and new-age industries/sectors can provide significant potential for Indian businesses and investors.

RAPID GROWTH IN SUSTAINABLE INVESTMENTS AMONG ASIAN FAMILY OFFICES

53% of Asian family office portfolios have sustainable investments. 31% have an ESG integration strategy with sustainability objectives.

THE INDIAN FAMILY CO-INVESTMENT WORKSHOP

A highly interactive half-day workshop bringing together family principals and private investors looking to co-invest with like-minded peers. The workshop will deliver exclusive case studies and co-investment best practices designed to overcome challenges while also hearing about some interesting co-investment opportunities currently available.



ARIHANT PATNI
Managing Director
Patni Financial Advisors
(Patni Family Office)

REASONS TO ATTEND

- 1** Learn how family offices are updating strategies to navigate the current global dynamics
- 2** Acquire an understanding on the principles applied in direct investments by peer families
- 3** Learn how families can better govern the relationship with their wealth and enterprises
- 4** Discuss future market trends in absolute confidence
- 5** Build an impressive network with peers
- 6** Dissect how economies are transforming and how to evolve

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 1,400 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 94740 | +91 84339 93963

Professional Partners

DSP
MUTUAL FUND



KARMA CAPITAL



BEAMS FINTECH FUND

Grow With  VentureCatalysts

Supporting Partners



THE PHOENIX
MILLS LIMITED

Organized by:

Campden FamilyConnect

Membership | Events | Research | Education | IPI
A Patni Family & Campden alliance

The Capital, A Wing - Unit:506, Bandra-Kurla Complex, Bandra (E), Mumbai - 51

+91 022 66940176

www.campdenfamilyconnect.com