



The CFA Society of the Philippines

Presents a seminar on

"MUTUAL FUND SELECTION TECHNIQUES FOR PROFESSIONAL INVESTORS"

Thursday, August 19, 2010, 2:00PM to 3:30PM
Executive Lounge, Makati Stock Exchange, 6767 Ayala Avenue, Makati City

Topic Overview:

To many investors, investing in a mutual fund is a cost effective way to rapidly establish an exposure to an asset class, a sector or a country as compared to directly investing in a portfolio of securities. Also, it spares investors the daunting task of examining a large quantity of materials on the securities and the markets.

Mr. Wong will share some essential quantitative tools and techniques in screening mutual funds, which include those proprietary developed by Lipper, Inc., that have proved to assist investors in selecting investment funds that consistently deliver superior risk-adjusted performance. He will also talk about some qualitative attributes that investors should apply in their fund selection processes and will use Philippine Mutual fund data in his illustrations. Atty. Lim, our guest speaker, will talk about the PERA Law and its current implementation and will give update on the Collective Scheme Bill.

Speakers:



Mr. Eric Wong
Head, Research
Lipper



Atty. Francis Lim
Senior Partner
ACCRALAW



As a participant in the CFA Institute Approved-Provider Program, the CFA Society of the Philippines has determined that this event qualifies for 1.5 credit hours. If you are a CFA Institute member, CE credit for your participation in this program will be automatically recorded in your CE Diary.

Seminar Fees:

Regular rate : Php 1,200.00
CFA Philippines Members : Php 500.00

"We implement a strict No Pay No Admission policy."

INQUIRIES

Please contact CFA Philippines at +63 (2) 6365411 loc. 136 or send email to info@cfaphilippines.org.

REGISTRATION FORM

Please send the completed Registration Form on or before August 13, 2010 (Friday) for early bird rate and August 16, 2010 (Monday) for regular rate to CFA Philippines either via email at info@cfaphilippines.org or through fax at +63 (2) 6354632.

PAYMENT DETAILS

You may deposit your payment at any Banco De Oro branches. The BDO Checking Account Name is "CHARTERED FINANCIAL ANALYST SOCIETY OF THE PHILIPPINES, INC." and Account Number is 286-009-3229. Kindly send copy of deposit slip to CFA Philippines thru email at info@cfaphilippines.org or fax to +63 (2) 6354632. You may also send a check to CFA Philippines c/o CitisecOnline, Inc. 2404D East Tower, PSE Centre, Exchange Road, Ortigas Center, Pasig City. Please make your check payable to "CHARTERED FINANCIAL ANALYST SOCIETY OF THE PHILIPPINES, INC."





SPEAKERS' PROFILE:



Mr. Eric Wong has been the Head of Research at Lipper, a Thomson Reuters company, in Hong Kong since 2007. Lipper is one of the world's leading companies on the quantitative analysis of funds. Eric provides analytical and portfolio construction solutions on the whole spectrum of fund products to financial institutions. He also participates in designing and developing new rating metrics and benchmark indices to help financial institutions, fund consulting companies, and investors to evaluate the performance of funds in the fund management industry.

Prior to joining Lipper, Eric managed a global fund of hedge funds at an asset management company in Hong Kong. He was also a member of an investment team in managing a global fund of mutual funds and a global long short equity fund. Separately, Eric has many years of experience in designing investment portfolios for high net-worth and institutional investors as well as monitoring their performance and recommending portfolio rebalancing.

Eric has a MBA from Imperial College and a Master degree in Economics with reference to the Asia-Pacific region from the School of Oriental & African Studies, University of London respectively. Also, he is a Chartered Alternative Investment Analyst (CAIA) charterholder, which was awarded by the Chartered Alternative Investment Analyst Association in the U.S. in 2005.



Mr. Francis Lim is a Senior Partner of ACCRALAW. He is a member of the Corporate and Special Projects Department (CSPD) and the Litigation and Dispute Resolution Department (LDRD) of ACCRALAW.

Mr. Lim re-joined ACCRALAW on July 5, 2010 after serving as President and CEO of the Philippine Stock Exchange (PSE) from September 15, 2004 to February 15, 2010. He is the longest serving President and CEO of the PSE. During his term, he also served as a Director of the PSE; President & CEO of the Securities Clearing Corporation of the Philippines (SCCP); Chairman of the Philippine Stock Exchange Foundation, Inc., (PSEFI) and Capital Market Development Center, Inc. (CMDCI); Director of the Philippine Dealing & Exchange Corporation (PDEX); Trustee of the Securities Investors Protection Fund (SIPF) and member of Capital Market Development Council (CMDC).

Mr. Lim is credited with several reform initiatives in the Philippine Stock Exchange. Among others, he successfully worked for the passage by Congress of several capital-market related laws, namely, Personal Equity Retirement Account Act (PERAA); Credit Investment System Act (CISA); Real Estate Investment Trust Act (REITA); Documentary Stamp Duty Exemption for secondary trading of listed stocks; and Financial Rehabilitation and Insolvency Act (FRIA). He was the Chairman of the Technical Work Group on the Collective Investment Schemes Law (CISL) and Chairman of the Technical Work Group on Real Estate Investments Trusts (REITS) in the Fourteenth Congress of the Senate of the Republic of the Philippines.

Mr. Lim is currently a member of the Financial Executives of the Philippines (FINEX) and Management Association of the Philippines (MAP). He is a law professor at the College of Law of the Ateneo de Manila University and the Graduate School of Law of San Beda College, and Professorial Lecturer of the Philippine Judicial Academy.



