

FOAHK 2024 Case Competition

Alternative Investment Portfolio Management

Looking for exposure to the burgeoning family office space?

Participants will have access to an exclusive training webinar and the opportunity to work closely with industry veterans. Shortlisted teams will receive mentorship from experts in leading banks, family offices, and asset management firms. They will also have the chance to present their ideas to seasoned industry professionals.

Theme: Alternative Investment & Quantitative Finance

In an era marked by financial complexity and evolving market dynamics, traditional investment avenues are no longer the sole source of financial growth and stability. Alternative investments, including private equity, venture capital, and other non-traditional asset classes, have gained prominence due to their potential to enhance diversification and yield. By immersing yourself in this competition, you will acquire the practical knowledge and analytical skills essential for navigating the world of alternative investments.

Register Now!

Registration Deadline:
8 Dec 12:00 pm (HKT/SGT)



Key Timeline

- Exclusive Webinar
9 Dec 10:30 - 11:30 am (HKT/SGT)
- Round 1 Release
11 Dec 12:00 pm (HKT/SGT)
- Round 1 Deck Submission
18 Dec 12:00 pm (HKT/SGT)
- Round 2 Release
12 Jan 12:00 pm (HKT/SGT)
- Round 2 Deck Submission
26 Jan 12:00 pm (HKT/SGT)
- Final Presentation
3 Feb 1:15 pm - 4:30 pm (HKT/SGT)

About FOAHK

(Family Office Association Hong Kong)

The FOAHK is an independent family office trade association established in November 2020. As a nonprofit consultative industry body, the FOAHK represents family offices serving ultra-high-net-worth (UHNW) individuals and their families on governance, legislative, and regulatory matters.



Ms. Angel Chia
Chair of FOAHK and
Founder & CEO of
NexGenerator Pte Ltd



Mr. Grant Ko
Chair of Education &
Research Sub Committee of
FOAHK and Chairman of
Wisdom Group Holdings

<https://www.foahk.org/case-competition-alternative-investments>

Awards

Champion

- Cash prize - \$5000
- CAIA Association *Fundamentals of Alternative Investments* course scholarship
- IPI x Henley Business School Family Office Programme - exclusive access to 2 modules

1st runner up

- Cash prize - \$3000
- IPI x Henley Business School Family Office Programme - exclusive access to 1 module

2nd runner up

- Cash prize - \$2000
- IPI x Henley Business School Family Office Programme - exclusive access to 1 module

Finalists

- On-site visits to top banks and asset management firms
- Publication on FOAHK's social media platforms, newsletter, and website
- Interview opportunities with 13+ asset management firms

Who We Are Looking For

- Full-time undergraduate students from all majors across the globe are welcome.
- Students from different universities within the same region may form a team. However, cross-region teams are not permitted.
- Each team must consist of 3-4 students and submit one online registration form before 8 December 2023.
- Each team must nominate a team captain who will be responsible for submitting the registration and receiving all competition material.

STAGES OF THE COMPETITION

01

Round 1 will focus on portfolio construction and wealth management. The question will be released on **December 11, 2023 at 12:00 PM HKT**.

02

Round 2 will be based on the round 1 framework. Students will be required to dive deeper into fund analysis and family office services that can add value to the client's portfolio. The shortlisted teams will receive the round 2 case on **January 12, 2024, at 12:00 PM HKT**. The FOAHK will then assign an industry mentor to each team.

Deck Submission & Presentation Requirements

- All decks and oral presentations should be conducted in **English** only.
- Round 1 - Participants should submit their PowerPoint deck in PDF format of **not more than 15 slides** (excluding cover page, agenda, and executive summary). A font size of at least 15 and 1.0 line spacing should be adopted.
- Round 2 - The final presentation will consist of a 15-minute presentation followed by a 10-minute Q&A on **February 3 2024**. Finalists will present their cases to experienced industry practitioners and government representatives. Teams in Hong Kong will conduct their presentation in-person, whilst those outside of Hong Kong will present virtually.

Learning Outcomes - What to Expect



Understand how a wealth manager generates long-term value and achieves clients' investment goals amidst the current macroeconomic environment.



Acquire practical business knowledge and insights from industry veterans through exclusive training and one-on-one mentorship.



Interact with renowned corporates and investment experts to broaden your industry network and deepen your understanding of the field.

EXCLUSIVE
WEBINAR

Time: 9 Dec 10:30 - 11:30 am (HKT/SGT)

- **Introduction to Quantitative Finance**
presented by Eric Pan, CIO of Pandtong Quantitative Research
- **Insights on Portfolio Management & Market Outlook**
presented by Jessica Huang, Portfolio Management Specialist of VMS Group

Industry Mentors



Jennifer Hsieh
Executive Director
Private Wealth
Management
Association



Tammy Thomas
Alternative
Investments Specialist
Pictet



Hongling Rao
Managing Director
CITIC Securities



Jonathan Lin
Professor
National Taiwan University
Partner
Andra Capital



Stephanie Joeson
Director,
Intermediary Sales
Janus Henderson
Investors



Sueann Yeo
Head of APAC PWM
Client Relations and
Capital Raising
EQT



Wei Hsien Chan
Managing Director
Private Investments

Judging Panel

Government
representatives
from



Grant Ko
Chair
Education & Research
Subcommittee
FOAHK



Neil Tan
Chairman
FinTech Association
of Hong Kong



Benson Wong
Managing Director,
Head of Client Digital
International
Private Bank



Sandro Treier
Head Intermediaries
Greater China
Julius Baer



Andrew Lee
Investment Director
Capital Group



Jacky Su
Investment Director
NF Trinity

Interview opportunities with:



and more...