

# Morningstar Investor Summit India

## 2023 Digital Agenda

Time	Saturday, 4 March
10:00 am – 10:05 am	<b>Opening Remarks and Introduction</b> <i>Mohit Aggarwal, Morningstar India</i>
10:05 am – 10:50 am	<b>Investing in Turbulent Times</b> <p>We know that the overall direction of the stock market is a continual rise in value over years. However, the rise is not linear and is constantly punctuated by falls. There are periods when pronounced risks loom and periods when valuations are stretched. Where are we right now? What lies ahead? What must investors focus on? A discussion.</p> <i>Sankaran Naren, ICICI Prudential AMC   Nilesh Shah, Kotak   Moderator: Kaustubh Belapurkar, Morningstar India</i>
10:50 am – 11:20 am	<b>How to Build a Mutual Fund Portfolio</b> <p>When faced with thousands of mutual funds, how does one make a smart pick? A winning fund is not just one that delivers an impressive risk-adjusted return, with a low expense ratio. What's as important is ensuring that they strategically enhance your own portfolio and match your investing objectives. We look at key factors that are essential to build a mutual fund portfolio.</p> <i>Himanshu Srivastava, Morningstar India</i>
11:20 am – 12:05 pm	<b>The Art of Mining Meaningful Goals</b> <p>Research has shown that investors who focus on their goals, can both increase their total return and remain motivated over the long haul. But how does one assess their own needs? Our expert shares research-led tips to mine meaningful and durable goals.</p> <i>Sagneet Kaur, Behavioural Research, Morningstar India</i>
12:05 pm – 12:50 pm	<b>The Global Landscape</b> <p>Mixed trends emerge from global markets. Headline inflation has started to abate but high core inflation has been persistent. Are the big economies perilously close to falling into recession? What does the reopening of China indicate? Morningstar's expert looks at whether 2023 is going to be a stormy ride or the fears are unfounded.</p> <i>Dan Kemp, Morningstar</i>
12:50 pm – 1:20 pm	<b>Tax Time</b> <p>It is that time of the year when investors are in a mad rush to fulfil their obligations so as to avail of the maximum tax break permitted under law. If you have a query, we shall address it.</p> <i>Rahul Sewda, Cleartax</i>
1:20 pm – 2:05 pm	<b>Ask Morningstar</b> <p>We are open to answering your queries. Tell us what you would like clarifications on, with respect to your overall</p>

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	portfolio strategy and mutual funds. <i>Morningstar Speakers</i>