

EMERGING VIETNAM

.hsc

Vietnam 2024: Growth and Adaptation

Le Meridien, 3C Ton Duc Thang, District 1, Ho Chi Minh City

June 19-20-21, 2024

AGENDA



DAY 1 Wednesday, June 19, 2024		
TIME	BALLROOM	NHA RONG ROOM
08:00 – 08:45	Registration & Coffee	
08:45 – 09:00	WELCOME SPEECH Mr. Trinh Hoai Giang, CEO, HSC	
09:00 – 10:15	Panel Discussion: VIETNAM MACRO & POLICY OUTLOOK 2024 "REBUILDING GROWTH MOMENTUM FROM GREEN SHOOTS IN TRADE AND CONTINUED POLICY SUPPORT" Moderator: Dr. Pham Vu Thang Long, Head of Macro Research, HSC Panelists: – Mr. Tran Quoc Khanh, Former Deputy Minister of Industry and Trade, Former Chief Trade Negotiator of the Government – Prof. Nguyen Xuan Thanh, Senior Lecturer in Public Policy, Fulbright School of Public Policy and Management – Dr. Can Van Luc, Chief Economist, BIDV, Member of National Fiscal and Monetary Policy Advisory Council – Dr. Pham Sy Thanh, Director of Center for Chinese Economic and Strategic Studies (CESS)	Corporate Presentation: HOA PHAT GROUP (HPG)
10:15 – 10:30	Tea Break	
10:30 – 11:45	Panel Discussion: VIETNAM EQUITY STRATEGY IN 2024 "VIETNAM SUCCESSFULLY PUSHING AGAINST THE TIDE" Moderator: Mr. Peter Redhead, Managing Director, Head of Research Division, HSC Panelists: – Dr. Pham Vu Thang Long, Head of Macro Research, HSC – Ms. Tran Huong My, Head of Consumer Research, HSC – Ms. Pham Lien Ha, Head of Financial Research, HSC – Ms. Vo Thi Ngoc Han, Head of Industrials and Technology Research, HSC – Ms. Ho Thi Kieu Trang, Head of Real Estate Research, HSC – Mr. Nguyen Hoang Nam, Head of Energy and Utilities Research, HSC	Corporate Presentation: ASIA COMMERCIAL BANK (ACB)
12:00 – 13:30	Lunch (M Floor & Ground Floor)	
13:30 – 14:45	Panel Discussion: TECHNOLOGY SECTOR "A NEW TECH HUB EMERGES: VIETNAM'S TALENT ON THE WORLD STAGE" Moderator: Ms. Vo Thi Ngoc Han, Head of Industrials and Technology Research, HSC Panelists: – Dr. Nguyen Thien Nghia, Director General, Authority of ICT Industry, MIC – Mr. Phung Viet Thang, Country Head, Intel Vietnam – Mr. Pham Minh Tuan, Executive Vice President, FPT, cum CEO FPT Software – Dr. Le Quan, Senior Engineering Faculty, Principal Investigator of Semiconductor Workforce Research Project, Fulbright University Vietnam	Corporate Presentation: SAIGON BEER–ALCOHOL–BEVERAGE CORPORATION (SAB)
14:45 – 15:00	Tea Break	
15:00 – 16:15	Panel Discussion: REAL ESTATE SECTOR "VIETNAM REAL ESTATE IN A REGIONAL CONTEXT" Moderator: Ms. Ho Thi Kieu Trang, Head of Real Estate Research, HSC Panelists: – Mr. Lucas Ignatius Loh Jen Yuh, CEO of Nam Long Group – Mr. Alex Crane, Managing Director, Knight Frank Vietnam – Dr. Pham Sy Thanh, Director of Center for Chinese Economic and Strategic Studies (CESS)	Corporate Presentation: DIGIWORLD CORPORATION (DGW)
16:15 – 16:30	Tea Break	
16:30 – 17:45	Panel Discussion: INSTITUTIONAL INVESTORS VIEW ON VIETNAM "TALES FROM THE BUY SIDE" Moderator: Mr. Ismael Pili, Head of Institutional Sales – International Market, HSC Panelists: – Dr. Le Anh Tuan, CIO, Dragon Capital – Mr. John Tsai, Head of Growth Equities, Eastspring Investments – Mr. Andrew Teoh, CEO and Co-Founder, Ikaria Group – Mr. David Chao, Global Market Strategist, Invesco – Mr. Khanh Vu, Co-Portfolio Manager – VOF, VinaCapital	Corporate Presentation: MASAN GROUP (MSN)
18:00 – 21:00	NETWORKING EVENT (Pre-registration is required.)	

DAY 2 Thursday, June 20, 2024		
TIME	BALLROOM	NHA RONG ROOM
08:00 – 09:00	Registration & Coffee	
09:00 – 10:15	Panel Discussion: CONSUMER SECTOR "READY FOR A RECOVERY?" Moderator: Ms. Tran Huong My, Head of Consumer Research, HSC Panelists: – Mr. Le Truong Son, Deputy Chief Executive Officer, Saigon Co.op – Mr. Nguyen Quang Tri, Managing Director of Marketing, Vinamilk – Mr. Ralf Matthaes, Managing Director, Infocus Mekong Research	Corporate Presentation: FPT CORPORATION (FPT)
10:15 – 10:30	Tea Break	
10:30 – 11:45	Panel Discussion: BANKING SECTOR "VIETNAM BANKS: TRENDS AND THE PICTURE ELSEWHERE" Moderator: Ms. Pham Lien Ha, Head of Financial Research, HSC Panelists: – Mr. Tran Phuong, Senior Executive Vice President, Bank for Investment and Development of Vietnam (BIDV) – Mr. Trinh Bao Quoc, Independent Director, Asia Commercial Bank (ACB) – Mr. Pham Hong Hai, Acting Chief Executive Officer, Orient Commercial JS Bank (OCB) – Mr. Weichuan Xu, Mekong Region Country Anchor, International Financial Corporation (IFC)	Corporate Presentation: VIETTEL CONSTRUCTION JOINT STOCK CORPORATION (CTR)
12:00 – 13:30	Lunch (M Floor & Ground Floor)	
13:30 – 14:45	Panel Discussion: LOGISTICS SECTOR "VIETNAM'S LOGISTICS REVOLUTION – BE PART OF THE TRANSFORMATION" Moderator: Ms. Vo Thi Ngoc Han, Head of Industrials and Technology Research, HSC Panelists: – Mr. Le Duy Hiep, President, Vietnam Logistics Business Association – Mr. Michael V. Nguyen, Country Head, Boeing Vietnam – Mr. Nguyen Quoc Khanh, BOD Member cum CEO, SCSC – Mr. Vu Thanh Hai, Chairman, Hai An Transport and Stevedoring JSC – Mr. Nguyen Manh Ha, Director of Marketing and Business Development, Gemadept	Corporate Presentation: KINH BAC CITY DEVELOPMENT HOLDING CORPORATION (KBC)
14:45 – 15:00	Tea Break	
15:00 – 16:15	Panel Discussion: PRIVATE EQUITY AND M&A IN VIETNAM "VIETNAM'S PRIVATE EQUITY AND M&A TRENDS" Moderator: Mr. Pham Ngoc Bich, Managing Director, Head of Corporate Finance Division, HSC Panelists: – Mr. Minh Do, Country Director, Warburg Pincus – Mr. Hoang Xuan Chinh, Managing Partner, Excelsior Capital – Mr. Yee Chung Seck, Partner, Baker McKenzie – Mr. Dinh The Anh, Partner & Head of Corporate Finance, KPMG Vietnam	Panel Discussion: "ESG ROADMAP IN VIETNAM" Moderator: Ms. Nguyen Nhat Ha Chi, ESG Manager, Dragon Capital Panelists: – Ms. Nguyen Thi Bich Ngoc, Head of IR Finance, VPBank – Ms. Nguyen Thi Thu Thao, Head of IR – PR, Gemadept – Mr. Nguyen Thanh Tuan, Head of Corporate Affairs, PNJ
16:15 – 16:30	CLOSING REMARKS Mr. Trinh Hoai Giang, CEO, HSC	

DAY 3 Friday, June 21, 2024	
TIME	SITE VISITS (All site visits are fully reserved. Pre-registration is required.)
07:30 – 17:30	1. Making and Taking Tour: Hoa Sen Phu My Steel – Sheet Plant, Gemalink (Ba Ria Vung Tau)
Pickup point at Le Meridien	2. Property Tour: Vietnam Singapore Industrial Park, The Classia – KDH Project, Vinhomes Grand Park – VHM Project
	3. Technology Along The Value Chain Tour: VTP Logistic Center, Long Chau Shops & Long Chau Vaccination Center, CMC Data Center

EVENT SITEMAP

1st Floor . M Floor . Ground Floor

