

IMAS Investment Conference  
& Masterclass 2024

**Masterclass 3**

Building better  
portfolios with ETFs





## **Masterclass: Building Better Portfolios with ETFs**

### **Synopsis:**

Exchange traded funds (ETFs) have come a long way since they were first launched in 1993, with global ETF assets having surpassed US\$10 trillion in 2023. From a niche investment option relative to traditional funds, ETFs have become one of the most popular tools in investors' portfolios. Innovation is continuing to provide more and more choices for a range of buyers—from first-time investors to professional wealth and asset managers—to choose how they navigate investing in a way that's convenient for them.

This masterclass is designed for investors keen to explore how to build better portfolios with ETFs. Be part of an engaging session where subject matter experts from iShares by BlackRock, the leading ETF provider in the world, demystify and help you navigate the dynamic world of ETFs.

### **The objectives and learning outcomes:**

- (a) Understand the key drivers fuelling ETF growth globally
- (b) Learn how to select the right ETF
- (c) Explore considerations and best practices when using ETFs within the portfolio construction process
- (d) Deep dive into investor case studies to access particular exposures through ETFs

### **Trainers:**

- 1. Christian Obrist, Head of iShares Asia ex Japan Institutional Distribution, BlackRock
- 2. Ivan Wong, Head of iShares South East Asia Institutional Distribution, BlackRock
- 3. Andy Ng, iShares Investment Strategist, Asia Pacific, BlackRock
- 4. Wee Lynn Low, CFA, FRM, Index Fixed Income Strategist, Asia ex-Japan, BlackRock
- 5. Sunita Subramoniam, Head of iShares Sustainable Product Strategy, Asia Pacific, BlackRock

### **Session Outline (2pm-5pm)**

- 1. Overview of ETF landscape and market growth
- 2. How to use ETFs in portfolios
- 3. Choosing an ETF: Due diligence considerations with interactive examples
- 4. Portfolio construction: Considerations and best practices Break out discussions
- 5. Q&A and break
- 6. Case studies on three ETF investment strategies
  - 6.1 Fixed Income ETF strategies
  - 6.2 Sustainable investing ETF strategies
  - 6.3 Precision ETF strategies
- 7. Closing
- 8. End



## Lesson Plan

No.	Details	Time allocation
1	<p><b>Overview of ETF landscape and market growth</b>            Global ETF assets are currently at US\$11.63 trillion<sup>1</sup> and projected to reach US\$30 trillion by 2033<sup>2</sup>. Hear about the key drivers fueling the ongoing ETF surge in Asia and around the world, and how investors can take advantage of opportunities that come along with it.</p> <p><i>Speaker: Christian Obrist, Head of iShares Asia ex Japan Institutional Distribution, BlackRock</i></p>	10 mins
2	<p><b>How to use ETFs in portfolios</b>            The emergence of ETFs has given investors a low-cost and tax-efficient way to access market exposures, but how many investors truly understand ETFs? This session will explore the simple but unique features of ETFs and how they have brought innovation to the financial markets, as well as the tangible benefits they bring to investors.</p> <p><i>Speaker: Christian Obrist, Head of iShares Asia ex Japan Institutional Distribution, BlackRock</i></p>	10 mins
3	<p><b>Choosing an ETF: Due diligence considerations with interactive examples</b>            A five-step ETF due diligence framework to help investors make better informed decisions when choosing ETFs to fit their investment needs. In addition, find out why differing levels of liquidity are important considerations in the ETF selection process.</p> <p>We will then follow with interactive workshop showcasing a number of different ETF usage case studies in portfolios to put your newfound ETF due diligence skills into practice.</p> <p><i>Speaker: Ivan Wong, Head of iShares South East Asia Institutional Distribution, BlackRock</i></p>	40 mins
4	<p><b>Portfolio construction: Considerations and best practices</b>            Rising rates, geopolitical tension and the collapse of well-known financial institutions brought about unforeseen challenges for investors in 2023. Learn about the important considerations when designing a portfolio and how investors can use ETFs to be nimble with asset allocation in response to market challenges.</p> <p><i>Speaker: Andy Ng, iShares Investment Strategist, Asia Pacific, BlackRock</i></p>	30 mins
5	Q&A and break	15 mins
6	<b>Case studies on three ETF investment strategies</b>	-
6.1	<p><b>Fixed Income ETF strategies</b></p> <p>We will discuss the four trends driving the growth of fixed income ETF market, as well as the key use cases for fixed income ETFs: Liquidity sleeve, tactical asset allocation, strategic asset allocation, portfolio transitions, cash continuum and derivative substitute. We will showcase some recent product innovation in the fixed income ETFs space, as well as demonstrate how investors can build better portfolio outcomes by using fixed income ETFs to navigate market volatility.</p> <p><i>Speaker: Wee Lynn Low, CFA, FRM, Index Fixed Income Strategist, Asia ex-Japan, BlackRock</i></p>	20 mins



6.2	<p><b>Sustainable investing ETF strategies</b></p> <p>ESG Risk and return considerations, growing client interest and the transition to a low-carbon economy are all drivers of growth for sustainable assets. In this session, you will learn about the key questions to ask about sustainable investing, as well as how investors can use ETFs to conveniently incorporate sustainable investing when considering key factors such as portfolio diversification and performance.</p> <p><i>Sunita Subramoniam, Head of iShares Sustainable Product Strategy, Asia Pacific, BlackRock</i></p>	20 mins
6.3	<p><b>Precision ETF strategies</b></p> <p>Megaforces such as changing demographics, global fragmentation, digital innovation and AI are reshaping the world of investing. Such megaforces offer long-term opportunities for investors who can leverage precision/thematic ETFs to access specific markets and potential alpha. Learn how investors can access these megaforces through the convenience of ETFs.</p> <p><i>Speaker: Andy Ng, iShares Investment Strategist, Asia Pacific, BlackRock</i></p>	20 mins
7	<p><b>Closing &amp; questions</b></p>	15 mins