

# Daiwa Investment Conference Hong Kong 2016

8-11 November 2016 (Tue-Fri)



**More than 150**  
companies in **1-on-1 /**  
**small group**  
**meetings**



**Compelling**  
**guest speakers**  
**and panel**  
**discussions**



**Thematic**  
**side trips**  
**before and after the**  
**conference**

Running parallel to 4 days of investor meetings with senior management representatives from some 150 listed companies from across Asia (including Japan), DIC Hong Kong 2016 will also feature thought-provoking speeches and lively panel discussions on a host of topics. Our expert guest speakers will put the spotlight on China. How is it faring in tackling the challenges facing its economy today? And what are the macro and political ramifications for China of the US presidential election? Other topics up for discussion include: how best to play the Japanese equity market; the relative investment merits of ASEAN powerhouses Thailand, Indonesia, Malaysia and Vietnam; and the prevailing market pressures and looming legal considerations facing Macau's Gaming operators and their concessions.

Alongside the conference, we have arranged a series of side trips — including the *Australia Search for Dividend Tour*, *China Environmental Tour*, *China Wind Power Tour*, *Guangdong Small-Mid Cap Tour*, *Guangzhou Auto Tour*, and *Vietnam Tour* — that will give attendees an on-the-ground look at how investment themes and stock ideas are playing out in key sectors and markets.

**Daiwa Investment Conference | Hong Kong**



# Daiwa Investment Conference | **Hong Kong**

**8-11 November 2016 (Tue-Fri)**  
**Island Shangri-La, Hong Kong**  
Pacific Place, Supreme Court Road, Admiralty

## Guest Speakers

Date & Time | **10:00 - 10:50, 8 November 2016 (Tue)**

**Certificate of Attendance**

Topic | **China investment outlook**



## **Dr. Mingchun Sun**

**Chairman & CIO of Deepwater Capital Limited**

Dr. Mingchun Sun, Ph.D, has been the Chairman and CIO of Deepwater Capital Limited, an asset-management company based in Hong Kong, since October 2014.

He was a founding partner and the Chief Economist of China Broad Capital Co. Ltd, one of the largest Chinese hedge funds based in Shanghai, over 2013-14.

Prior to joining China Broad Capital Co., Limited, Dr. Sun held the positions of Managing Director, Head of China Research and Chief Greater China Economist at Daiwa Capital Markets Hong Kong, after serving as the Chief China Economist, Head of China Equity Research and Managing Director at Nomura International (Hong Kong), and Senior China Economist, Vice President at Lehman Brothers Asia Limited.

Before starting his banking career, he worked at the State Administration of Foreign Exchange, where he published a book on the CNY exchange rate and more than 50 economics articles in Chinese academic journals.

Dr. Sun was ranked as the No.3 Asia Economist in the 2012 Institutional Investor Asia Research Survey. In 2012, he was the first to identify a nascent recovery in China, though he maintains his long-term cautious view. He has been an Independent Non-Executive Director at iOne Holdings Limited since 21 July 2014. And he serves as the Vice Chairman of the Chinese Financial Association of Hong Kong and is a member of the China Finance 40 Forum.

He received a Bachelor's Degree in International Economics from Fudan University in July 1993. He also obtained a Master's degree in Engineering-economic systems and operations research, and a Ph.D. in Management Science and Engineering from Stanford, specialising in Economics and Finance in June 2001 and June 2006, respectively.

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# Daiwa Investment Conference | Hong Kong

## Guest Speakers

Date & Time | 11:00 - 11:50, 8 November 2016 (Tue)

Certificate of Attendance

Topic | Japanese equity market outlook

- Stability of Abe Administration stands out as major countries face political uncertainties
- Japanese firms warrant attention for their ability to achieve greater earnings/shareholder payouts despite stronger Yen



## Mr. Kazuhiro Miyake

**Chief Strategist on Japanese Equity Strategy of Daiwa Securities Co. Ltd.**

Mr. Kazuhiro Miyake has more than 30 years' experience as a strategist covering Japanese equities at Daiwa Securities Co., Ltd. For about the past 20 years, he has been repeatedly ranked in the top-5 in the best analyst and strategist categories by the Nikkei newspaper (The Nikkei Financial Daily and The Nikkei Veritas) and Institutional Investor Magazine (II). He was ranked 3rd most popular Japanese equity strategist by Institutional Investor Magazine in 2015, 2014 and 2012.

Mr. Miyake received his MBA from the University of Tsukuba, Japan.

Date & Time | 15:30 - 16:20, 8 November 2016 (Tue)

Certificate of Attendance

Topic | The rise of new protectionism and other issues



## Mr. Kevin Lai

**Chief Economist, Asia ex-Japan of Daiwa Capital Markets Hong Kong Limited**

Kevin has 20 years' experience as a regional economist, being one of the few on the street today to have witnessed the entire Asian Financial Crisis, from start to finish. In early 2014, he established three major "outlier" calls. First, he predicted the US Dollar would enter a new phase of strength. Second, he anticipated massive money outflows from China. Third, he argued that the CNY would come under immense depreciation pressure and the world should be worried about it. More recently, he argued that China would turn aggressive with its monetary policy, but that such a policy would ultimately be in vain. Kevin's views have not always been warmly received. Yet the eventual outcomes underline his prescience, with Bloomberg flagging that prescience in an article entitled "Yuan Bear in the Wilderness in 2014 Now Warns of China Credit Crisis". Born and raised in Hong Kong, Kevin graduated from the London School of Economics in 1994.

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## Panel Discussion

Date & Time | 12:00 - 13:20, 8 November 2016 (Tue)

Certificate of Attendance

## ASEAN

### Will the outperformance continue in 2017?

ASEAN markets, in particular Thailand and Indonesia, have been among the best performers in the region YTD, driven by a continual stream of cheap money and quantitative easing. Our panel, consisting of the heads of research from our alliance partners in Southeast Asia, address whether this trend can continue in the face of rising interest rates, a strengthening USD and an increasingly unstable political environment with their major trading partner, China. We take a look at what's ahead for the markets in Thailand, Indonesia, Malaysia and for the first time at DICHK, Vietnam. Each head of research will present an in depth, on-the-ground analysis of what's driving their markets, including what to buy and what to sell in 2017.

### Panelists



#### Mr. Kwok Yan Chue

Head of Research

Affin Hwang Capital | Malaysia

Chue Kwok Yan has more than 15 years of experience in equity research. In October 2015, Kwok Yan joined Affin Hwang as the new Head of Research. Prior to his appointment, Kwok Yan spent 10 years at KAF Seagroatt & Campbell as the Director of Research. He was one of the pioneers in building KAF's Institutional Research expertise into one of the best rated research outfits in Malaysia. Prior to KAF, Kwok Yan spent a year at CLSA Malaysia as a senior staff member in Equity Research. Before that, he was with ABN Amro Malaysia, where he began his career and rose to the position of Assistant Director in five years. Kwok Yan graduated from Imperial College of Science, Technology and Medicine with a degree in Electrical & Electronics Engineering.

#### Mr. Harry Su

Head of Research

Bahana Securities | Indonesia

Harry Su has been working in the Jakarta capital market since 1993. He spent five years at CLSA as Deputy Research Director covering the Indonesian consumer sector. In 1998, he became Research Director at BNP Paribas, where in the next 10 years he was responsible for carrying out a combination of Indonesian market strategy and coverage of the telco and consumer sectors. Since 2008, he has joined state-owned Bahana Securities, a leading local brokerage, as Senior Associate Director and Head of Research. Starting July 2013, he is also Bahana's Head of Equities. Harry is responsible for developing the current Daiwa-Bahana co-branded research, which commenced in November 2013. Since 1995, Harry has consistently been a rated equity analyst in various internal as well as external investors' polls.



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## Panel Discussion

### ASEAN

#### Will the outperformance continue in 2017?

#### Panelists (cont'd)



### **Ms. Phuong Hoang**

**Head of Institutional Research and Investment Advisory  
Saigon Securities Inc. | Vietnam**

Having joined SSI Research & Investment Advisory at the beginning of 2007, Ms. Phuong Hoang can draw upon 10 years of experience covering the development of Vietnam's stock market. During that time she has covered the conglomerates, steel, pharmaceuticals, and oil & gas sector, and she is now responsible for SSI's equity strategy. She was made Head of Institutional Research and Investment Advisory in 2011, and in 2013, 2014 and 2015 she received Best Country Analyst and Best Strategist – Vietnam awards. Under her leadership, SSI Research has been a consistent winner in the major categories of the Asiamoney Brokers Poll, including Best Country Research – Vietnam.

### **Dr. Kampon Adireksombat**

**Deputy Head of Research; Thailand Economist & Strategist  
Thanachart Securities | Thailand**



Prior to joining Thanachart as an economist/equity strategist, Kampon was chief economist/an equity strategist at Deutsche Bank TISCO. Kampon was also an Assistant Professor in the Economics division at Nanyang Technological University in Singapore and held positions with Siam Commercial Bank as well as Thailand's Ministry of Finance. He earned a BA in Economics with honours from Chulalongkorn University, an MSc in Economics from the National University of Singapore (Asian Development Bank scholarship), and a Ph.D. in Economics from Michigan State University (Graduate school fellowship).



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## Panel Discussion

Date & Time | 14:30 - 15:20, 8 November 2016 (Tue)

Certificate of Attendance

## Video Briefing & Q&A: Macau Gaming A view on Macau's political and policy environment

Mr. José Pereira Coutinho has a clear view of the issues facing the gaming sector from a legal standpoint, given his career in law prior to his entry into politics. In this pre-recorded video session, Mr. Coutinho and Daiwa's gaming analyst, Mr. Jamie Soo, will provide valuable insights into the state of play in Macau's Gaming sector and the related policy framework. Discussion topics include: 1) the overall policy outlook, 2) who makes the final call in Macau, 3) a view on concession renewals, and 4) potential surprises in Macau over the next 5 years. The video briefing will be followed by a live Q&A with Mr. Jamie Soo.

### Panelists



### Mr. José Pereira Coutinho

**Deputy of the Legislative Assembly of Macau**  
**President of New Hope (political party in Macau)**  
**President of Macau Civil Servants Association**

José Pereira Coutinho is a member of the Legislative Assembly of Macau, one of the highest governing bodies in Macau and where his party, New Hope, occupies 2 of the 14 seats for elected members. Mr. Pereira Coutinho is one of the longest-serving directly elected members of the assembly (on his 3rd term, with almost 12 years in office) and has been among the most vocal on issues relating to the Gaming Sector.

### Mr. Jamie Soo

**Consumer & Gaming Analyst of**  
**Daiwa Capital Markets Hong Kong Limited**

Jamie Soo joined Daiwa Capital Markets in November 2013 as an analyst covering the Hong Kong and China Consumer Sector. As the Regional Head of Gaming at Daiwa, he has been responsible for several differentiated research reports on the Macau Gaming Sector. He was one of the first analysts to debunk the "build it and they will come" mantra in the sector in late-2014, and was named the industry's top-ranked analyst by Bloomberg in late-2015.



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## Analyst Workshops



### Mr. Kwok Yan Chue

Head of Research

Affin Hwang Capital | Malaysia

Available On 9 November (Wed)

### Mr. Harry Su

Head of Research

Bahana Securities | Indonesia

Available On 9 November (Wed)



### Dr. Kampon Adireksombat

Deputy Head of Research;

Thailand Economist & Strategist

Thanachart Securities | Thailand

Available On 9 November (Wed)

### Mr. Kazuhiro Miyake

Chief Strategist on Japanese Equity Strategy

Daiwa Securities Co. Ltd. | Japan

Available On 8 November (Tue)



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## HKEX Workshop

Date & Time | 15:30 - 16:20, 9 November 2016 (Wed)

Topic | **The Stock Connect; The Mutual market;  
and how HK might fit into the future financial architecture of China**



### Mr. Tae Yoo

**Managing Director, Head of Client Business Development  
& FIC Development, Global Markets Division  
Hong Kong Exchanges and Clearing Limited**

Mr. Tae Seok Clement Yoo serves as Managing Director and Head of Client Business Development & FIC Development department. His Client Business Development department is responsible for IPO issuer marketing, exchange participant relations and client relationship marketing. His FIC (Fixed Income & Currency) Development department is responsible for the development of fixed income and currency business and the development of index solutions across the organisation.

Since joining HKEX in 2011, he served as co-head of platform development & strategy and as head of product & index development. Mr. Yoo has over 21 years of exchange industry experience with 14 years at CME Group (Chicago Mercantile Exchange) in Clearing, Risk Management, Business Development & Strategy and Products & Services in US and Asia. Prior to joining CME, he held various positions at Sumitomo Mitsui Bank (Sakura Dellsher, Inc.) and at Goldman Sachs & Co. in Chicago.

Mr. Yoo holds a bachelor's degree in accounting and computer applications from the University of Notre Dame and MBA degree from the Stuart School of Business at the Illinois Institute of Technology. He participated in the GSAL program at the University of Chicago, Graduate School of Business. He has been named an inventor on nine U.S. patents on derivatives risk management applications.



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No. of Confirmed Companies as of 31-Oct: **156**

**Asia (ex-Japan)  
& US  
Companies:  
111**

## HONG KONG / CHINA

Ticker	Company Name	Sector
2020 HK	ANTA	Consumer Discretionary
2357 HK	AVICHINA INDUS-H	Industrials
2111 HK	BEST PACIFIC INTL	Consumer Discretionary
963 HK	BLOOMAGE BIOTECH	Materials
2588 HK	BOC AVIATION LTD	Industrials
1848 HK	CALC	Industrials
1381 HK	CANVEST	Utilities
606 HK	CHINA AGRI-INDUS	Consumer Staples
257 HK	CHINA EVERBRIGHT	Industrials
3836 HK	CHINA HARMONY AUTO	Consumer Discretionary
867 HK	CHINA MEDICAL SYSTEM	Health Care
144 HK	CHINA MERCHANTS PORT	Industrials
688 HK	CHINA OVERSEAS	Real Estate
1193 HK	CHINA RES GAS	Utilities
291 HK	CHINA RESOURCES	Consumer Staples
2877 HK	CHINA SHINEWAY	Health Care
3311 HK	CHINA STATE CONS	Industrials
966 HK	CHINA TAIPING	Financials
728 HK	CHINA TELECOM-H	Telecommunication Services
762 HK	CHINA UNICOM	Telecommunication Services

*For further details, please contact your Daiwa sales representative.*

Note: Sectors are classified in accordance to Global Industry Classification Standard (GICS).

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**Asia (ex-Japan)  
& US  
Companies:  
111**

## HONG KONG / CHINA (CONT'D)

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
2202 HK	CHINA VANKE-H	Real Estate
1883 HK	CITIC TELECOM	Telecommunication Services
1038 HK	CKI HOLDINGS	Utilities
2369 HK	COOLPAD	Information Technology
1363 HK	CT ENVIRONMENTAL	Utilities
2688 HK	ENN ENERGY	Utilities
729 HK	FDG EVEHICLES	Industrials
175 HK	GEELY AUTOMOBILE	Consumer Discretionary
1086 HK	GOODBABY INTL	Consumer Discretionary
270 HK	GUANGDONG INVESTMENT	Utilities
1788 HK	GUOTAI JUNAN	Financials
665 HK	HAITONG INTL	Financials
101 HK	HANG LUNG	Real Estate
12 HK	HENDERSON LAND	Real Estate
1044 HK	HENGAN INTL	Consumer Staples
2638 HK	HK ELECTRIC	Utilities
388 HK	HKEX	Financials
54 HK	HOPEWELL HLDGS	Industrials
737 HK	HOPEWELL INFR	Industrials
1347 HK	HUA HONG SEMI	Information Technology
1970 HK	IMAX CHINA	Consumer Discretionary
207 HK	JOY CITY PPT	Real Estate
636 HK	KERRY LOGISTICS	Industrials
268 HK	KINGDEE INTL SFT	Information Technology
950 HK	LEE'S PHARM	Health Care
960 HK	LONGFOR	Real Estate
1317 HK	MAPLELEAF EDU	Consumer Discretionary
3600 HK	MODERN DENTAL GROUP	Health Care

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**Asia (ex-Japan)  
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Companies:  
111**

## HONG KONG / CHINA (CONT'D)

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
66 HK	MTR CORP	Industrials
3918 HK	NAGACORP LTD	Consumer Discretionary
17 HK	NEW WORLD DEV	Real Estate
2689 HK	NINE DRAGONS PAPER	Materials
316 HK	ORIENT OVERSEAS	Industrials
857 HK	PETROCHINA-H	Energy
2318 HK	PING AN-H	Financials
6 HK	POWER ASSETS	Utilities
2313 HK	SHENZHOU INTL	Consumer Discretionary
813 HK	SHIMAO PROPERTY	Real Estate
312 HK	SHIRBLE DEPARTMENT	Consumer Discretionary
460 HK	SIHUAN PHARM	Health Care
83 HK	SINO LAND	Real Estate
386 HK	SINOPEC CORP-H	Energy
2386 HK	SINOPEC ENGINE-H	Industrials
981 HK	SMIC	Information Technology
1836 HK	STELLA INTL	Consumer Discretionary
2382 HK	SUNNY OPTICAL	Information Technology
2678 HK	TEXHONG TEXTILE	Consumer Discretionary
819 HK	TIANNENG POWER	Consumer Discretionary
8138 HK	TONGRENTANGCM	Health Care
511 HK	TVB	Consumer Discretionary
3331 HK	VINDA INTL HLDGS	Consumer Staples
151 HK	WANT WANT CHINA	Consumer Staples
288 HK	WH GROUP LTD	Consumer Staples
4 HK	WHARF HLDGS	Real Estate
20 HK	WHEELOCK & CO	Real Estate

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**Asia (ex-Japan)  
& US  
Companies:  
111**

## ASEAN

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
GNP IN	GLENMARK PHARM	Health Care
AKRA IJ	AKR CORPORINDO	Industrials
JPFA IJ	JAPFA COMFEED	Consumer Staples
KIJA IJ	KAWASAN INDUSTRI	Real Estate
LPKR IJ	LIPPO KARAWACI	Real Estate
MNCN IJ	MEDIA NUSANTARA	Consumer Discretionary
SILO IJ	SILOAM INTL	Health Care
TLKM IJ	TELEKOMUNIKASI	Telecommunication Services
PREIT MK	PAVILION REIT	Real Estate
SWB MK	SUNWAY BHD	Real Estate
TOPG MK	TOP GLOVE	Health Care
SMC PM	SAN MIGUEL	Industrials
CEWL SP	CHINA EVERBRIGHT	Utilities
JAP SP	JAPFA LTD	Consumer Staples
M1 SP	M1 LTD	Telecommunication Services
YOMA SP	YOMA STRATEGIC	Real Estate
GPSC TB	GLOBAL POWER SYN	Utilities
IRPC TB	IRPC PCL	Energy
TU TB	THAI UNION GROUP	Consumer Staples
DTAC TB	TOTAL ACCESS COM	Telecommunication Services
VCB VN	BANK FOR FOREIGN TRADE	Financials
SSI VN	SAIGON SECURITIES	Financials
VNM VN	VIETNAM DAIRY PRODUCTS	Consumer Staples

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**Asia (ex-Japan)  
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Companies:  
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## KOREA

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
027410 KS	BGF RETAIL CO LTD	Consumer Staples
018880 KS	HANON SYSTEMS	Consumer Discretionary
024110 KS	INDUSTRIAL BANK	Financials
033920 KS	MUHAK CO LTD	Consumer Staples

## TAIWAN

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
8406 TT	GINKO INTL	Health Care
1707 TT	GRAPE KING BIO	Consumer Staples
2228 TT	IRON FORCE INDUSTRIAL	Consumer Discretionary
2454 TT	MEDIATEK INC	Information Technology
5388 TT	SERCOMM CORP	Information Technology
9938 TT	TAIWAN PAIHO LTD	Consumer Discretionary
2303 TT	UNITED MICROELEC	Information Technology
6409 TT	VOLTRONIC POWER	Industrials

## US

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
STV US	CHINA DIGITA-ADR	Information Technology

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**Japan  
Companies:  
45**

## JAPAN

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
2131 JP	ACCORDIA GOLF CO	Consumer Discretionary
9783 JP	BENESSE	Consumer Discretionary
8601 JP	DAIWA SECS GRP	Financials
4921 JP	FANCL CORP	Consumer Staples
6702 JP	FUJITSU LTD	Information Technology
6457 JP	GLORY LTD	Industrials
3281 JP	GLP J-REIT	Real Estate
9449 JP	GMO INTERNET INC	Information Technology
3765 JP	GUNGHO ONLINE	Information Technology
6305 JP	HITACHI CONST MA	Industrials
6501 JP	HITACHI LTD	Information Technology
3003 JP	HULIC CO LTD	Real Estate
5019 JP	IDEMITSU KOSAN	Energy
7599 JP	IDOM INC	Consumer Discretionary
7013 JP	IHI CORP	Industrials
3774 JP	INTERNET INITIATIVE	Information Technology
3086 JP	J FRONT RETAILING	Consumer Discretionary
9201 JP	JAPAN AIRLINES	Industrials
8697 JP	JAPAN EXCHANGE	Financials
2914 JP	JAPAN TOBACCO	Consumer Staples
4452 JP	KAO CORP	Consumer Staples
2503 JP	KIRIN HOLDINGS C	Consumer Staples
4902 JP	KONICA MINOLTA	Information Technology
2651 JP	LAWSON INC	Consumer Staples
4912 JP	LION CORP	Consumer Staples
5938 JP	LIXIL GROUP CORP	Industrials
8058 JP	MITSUBISHI CORP	Industrials
7003 JP	MITSUI ENG&SHIPB	Industrials
6268 JP	NABTESCO CORP	Industrials
7988 JP	NIFCO INC	Consumer Discretionary

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# Daiwa Investment Conference | Hong Kong

**Japan  
Companies:  
45**

## JAPAN (CONT'D)

<i>Ticker</i>	<i>Company Name</i>	<i>Sector</i>
2127 JP	NIHON M&A CENTER	Financials
9101 JP	NIPPON YUSEN KK	Industrials
7240 JP	NOK	Consumer Discretionary
5401 JP	NSSMC	Materials
7733 JP	OLYMPUS CORP	Health Care
8954 JP	ORIX JREIT INC	Real Estate
7817 JP	PARAMOUNT BED HO	Health Care
4927 JP	POLA ORBIS	Consumer Staples
8473 JP	SBI HOLDINGS INC	Financials
4204 JP	SEKISUI CHEM CO	Consumer Discretionary
1928 JP	SEKISUI HOUSE	Consumer Discretionary
4004 JP	SHOWA DENKO K K	Materials
2768 JP	SOJITZ CORP	Industrials
6758 JP	SONY CORP	Consumer Discretionary
3397 JP	TORIDOLL.CORP	Consumer Discretionary

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No. of Confirmed Companies as of 31-Oct: **156**

**Consumer Discretionary:**  
28 companies

## CONSUMER DISCRETIONARY

Ticker	Company Name	Country
2020 HK	ANTA	HK / China
2111 HK	BEST PACIFIC INTL	HK / China
3836 HK	CHINA HARMONY AUTO	HK / China
175 HK	GEELY AUTOMOBILE	HK / China
1086 HK	GOODBABY INTL	HK / China
1970 HK	IMAX CHINA	HK / China
1317 HK	MAPLELEAF EDU	HK / China
3918 HK	NAGACORP LTD	HK / China
2313 HK	SHENZHOU INTL	HK / China
312 HK	SHIRBLE DEPARTMENT	HK / China
1836 HK	STELLA INTL	HK / China
2678 HK	TEXHONG TEXTILE	HK / China
819 HK	TIANNENG POWER	HK / China
511 HK	TVB	HK / China
MNCN IJ	MEDIA NUSANTARA	Indonesia

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**Consumer Discretionary:**  
28 companies

## CONSUMER DISCRETIONARY (CONT'D)

Ticker	Company Name	Country
2131 JP	ACCORDIA GOLF CO	Japan
9783 JP	BENESSE	Japan
7599 JP	IDOM INC	Japan
3086 JP	J FRONT RETAILING	Japan
7988 JP	NIFCO INC	Japan
7240 JP	NOK	Japan
4204 JP	SEKISUI CHEM CO	Japan
1928 JP	SEKISUI HOUSE	Japan
6758 JP	SONY CORP	Japan
3397 JP	TORIDOLL.CORP	Japan
018880 KS	HANON SYSTEMS	Korea
2228 TT	IRON FORCE INDUSTRIAL	Taiwan
9938 TT	TAIWAN PAIHO LTD	Taiwan

**Consumer Staples:**  
20 companies

## CONSUMER STAPLES

Ticker	Company Name	Country
606 HK	CHINA AGRI-INDUS	HK / China
291 HK	CHINA RESOURCES	HK / China
1044 HK	HENGAN INTL	HK / China
3331 HK	VINDA INTL HLDGS	HK / China
151 HK	WANT WANT CHINA	HK / China
288 HK	WH GROUP LTD	HK / China
JPFA IJ	JAPFA COMFEED	Indonesia
4921 JP	FANCL CORP	Japan
2914 JP	JAPAN TOBACCO	Japan
4452 JP	KAO CORP	Japan
2503 JP	KIRIN HOLDINGS C	Japan
2651 JP	LAWSON INC	Japan

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# Daiwa Investment Conference | Hong Kong

**Consumer Staples:**  
20 companies

## CONSUMER STAPLES (CONT'D)

Ticker	Company Name	Country
4912 JP	LION CORP	Japan
4927 JP	POLA ORBIS	Japan
027410 KS	BGF RETAIL CO LTD	Korea
033920 KS	MUHAK CO LTD	Korea
JAP SP	JAPFA LTD	Singapore
1707 TT	GRAPE KING BIO	Taiwan
TU TB	THAI UNION GROUP	Thailand
VNM VN	VIETNAM DAIRY PRODUCTS	Vietnam

**Energy:**  
4 companies

## ENERGY

Ticker	Company Name	Country
857 HK	PETROCHINA-H	HK / China
386 HK	SINOPEC CORP-H	HK / China
5019 JP	IDEMITSU KOSAN	Japan
IRPC TB	IRPC PCL	Thailand

**Financials:**  
12 companies

## FINANCIALS

Ticker	Company Name	Country
966 HK	CHINA TAIPING	HK / China
1788 HK	GUOTAI JUNAN	HK / China
665 HK	HAITONG INTL	HK / China
388 HK	HKEX	HK / China
2318 HK	PING AN-H	HK / China

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## Financials: 12 companies

## FINANCIALS (CONT'D)

Ticker	Company Name	Country
8601 JP	DAIWA SECS GRP	Japan
8697 JP	JAPAN EXCHANGE	Japan
2127 JP	NIHON M&A CENTER	Japan
8473 JP	SBI HOLDINGS INC	Japan
024110 KS	INDUSTRIAL BANK	Korea
VCB VN	BANK FOR FOREIGN TRADE	Vietnam
SSI VN	SAIGON SECURITIES	Vietnam

## Health Care: 12 companies

## HEALTH CARE

Ticker	Company Name	Country
867 HK	CHINA MEDICAL SYSTEM	HK / China
2877 HK	CHINA SHINEWAY	HK / China
950 HK	LEE'S PHARM	HK / China
3600 HK	MODERN DENTAL GROUP	HK / China
460 HK	SIHUAN PHARM	HK / China
8138 HK	TONGRENTANGCM	HK / China
GNP IN	GLENMARK PHARM	India
SILO IJ	SILOAM INTL	Indonesia
7733 JP	OLYMPUS CORP	Japan
7817 JP	PARAMOUNT BED HO	Japan
TOPG MK	TOP GLOVE	Malaysia
8406 TT	GINKO INTL	Taiwan

*For further details, please contact your Daiwa sales representative.*

Note: Sectors are classified in accordance to Global Industry Classification Standard (GICS).

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**Industrials:**  
26 companies

## INDUSTRIALS

Ticker	Company Name	Country
2357 HK	AVICHINA INDUS-H	HK / China
2588 HK	BOC AVIATION LTD	HK / China
1848 HK	CALC	HK / China
257 HK	CHINA EVERBRIGHT	HK / China
144 HK	CHINA MERCHANTS PORT	HK / China
3311 HK	CHINA STATE CONS	HK / China
729 HK	FDG EVEHICLES	HK / China
54 HK	HOPEWELL HLDGS	HK / China
737 HK	HOPEWELL INFR	HK / China
636 HK	KERRY LOGISTICS	HK / China
66 HK	MTR CORP	HK / China
316 HK	ORIENT OVERSEAS	HK / China
2386 HK	SINOPEC ENGINE-H	HK / China
AKRA IJ	AKR CORPORINDO	Indonesia
6457 JP	GLORY LTD	Japan
6305 JP	HITACHI CONST MA	Japan
7013 JP	IHI CORP	Japan
9201 JP	JAPAN AIRLINES	Japan
5938 JP	LIXIL GROUP CORP	Japan
8058 JP	MITSUBISHI CORP	Japan
7003 JP	MITSUI ENG&SHIPB	Japan
6268 JP	NABTESCO CORP	Japan
9101 JP	NIPPON YUSEN KK	Japan
2768 JP	SOJITZ CORP	Japan
SMC PM	SAN MIGUEL	Philippines
6409 TT	VOLTRONIC POWER	Taiwan

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**Information Technology:**  
15 companies

## INFORMATION TECHNOLOGY

Ticker	Company Name	Country
2369 HK	COOLPAD	HK / China
1347 HK	HUA HONG SEMI	HK / China
268 HK	KINGDEE INTL SFT	HK / China
981 HK	SMIC	HK / China
2382 HK	SUNNY OPTICAL	HK / China
6702 JP	FUJITSU LTD	Japan
9449 JP	GMO INTERNET INC	Japan
3765 JP	GUNGHO ONLINE	Japan
6501 JP	HITACHI LTD	Japan
3774 JP	INTERNET INITIATIVE	Japan
4902 JP	KONICA MINOLTA	Japan
2454 TT	MEDIATEK INC	Taiwan
5388 TT	SERCOMM CORP	Taiwan
2303 TT	UNITED MICROELEC	Taiwan
STV US	CHINA DIGITA-ADR	US

**Materials:**  
4 companies

## MATERIALS

Ticker	Company Name	Country
963 HK	BLOOMAGE BIOTECH	HK / China
2689 HK	NINE DRAGONS PAPER	HK / China
5401 JP	NSSMC	Japan
4004 JP	SHOWA DENKO K K	Japan

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**Real Estate:**  
19 companies

## REAL ESTATE

Ticker	Company Name	Country
688 HK	CHINA OVERSEAS	HK / China
2202 HK	CHINA VANKE-H	HK / China
101 HK	HANG LUNG	HK / China
12 HK	HENDERSON LAND	HK / China
207 HK	JOY CITY PPT	HK / China
960 HK	LONGFOR	HK / China
17 HK	NEW WORLD DEV	HK / China
813 HK	SHIMAO PROPERTY	HK / China
83 HK	SINO LAND	HK / China
4 HK	WHARF HLDGS	HK / China
20 HK	WHEELOCK & CO	HK / China
KIJA IJ	KAWASAN INDUSTRI	Indonesia
LPKR IJ	LIPPO KARAWACI	Indonesia
3281 JP	GLP J-REIT	Japan
3003 JP	HULIC CO LTD	Japan
8954 JP	ORIX JREIT INC	Japan
PREIT MK	PAVILION REIT	Malaysia
SWB MK	SUNWAY BHD	Malaysia
YOMA SP	YOMA STRATEGIC	Singapore

**Tele-communication Services:**  
6 companies

## TELECOMMUNICATION SERVICES

Ticker	Company Name	Country
728 HK	CHINA TELECOM-H	HK / China
762 HK	CHINA UNICOM	HK / China
1883 HK	CITIC TELECOM	HK / China
TLKM IJ	TELEKOMUNIKASI	Indonesia
M1 SP	M1 LTD	Singapore
DTAC TB	TOTAL ACCESS COM	Thailand

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## Utilities:

10 companies

## UTILITIES

<i>Ticker</i>	<i>Company Name</i>	<i>Country</i>
1381 HK	CANVEST	HK / China
1193 HK	CHINA RES GAS	HK / China
1038 HK	CKI HOLDINGS	HK / China
1363 HK	CT ENVIRONMENTAL	HK / China
2688 HK	ENN ENERGY	HK / China
270 HK	GUANGDONG INVESTMENT	HK / China
2638 HK	HK ELECTRIC	HK / China
6 HK	POWER ASSETS	HK / China
CEWL SP	CHINA EVERBRIGHT	Singapore
GPSC TB	GLOBAL POWER SYN	Thailand

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