

The 9th Annual Japan Indexing Forum Innovation and Opportunity in the Evolving Passive Investing Ecosystem

DATE: Monday, November 13, 2023

TIME: 2:00 PM – 5:50 PM JST

2:00 PM – 2:10 PM **OPENING REMARKS**

Naoya Takahashi, Executive Officer, JPX Market Innovation & Research

Part I: The Evolving Index Ecosystem and the Effectiveness of Passive Strategies

2:10 PM – 2:30 PM **INSIDE THE ACTIVE VS. PASSIVE DEBATE: SPIVA SCORECARD'S LATEST DATA AND INSIGHTS**

Craig Lazzara, CFA, Managing Director, Index Investment Strategy,
S&P Dow Jones Indices

2:30 PM – 2:50 PM **OPPORTUNITIES IN DIVIDEND AND THEMATIC INVESTING**

Jason Ye, Director, Factors and Thematics Indices, S&P Dow Jones Indices

2:50 PM – 3:10 PM **THE RELEVANCE OF U.S. EQUITIES TO JAPAN**

Craig Lazzara, CFA, Managing Director, Index Investment Strategy,
S&P Dow Jones Indices

3:10 PM – 3:30 PM **THE GROWTH OF FIXED INCOME ETFs: ON THE ROAD TO USD 5 TRILLION**

Dohei Echizenya, Head of ETF Business, BlackRock Japan

3:30 PM – 3:45 PM **BREAK**

Part II: Japanese Equity Market Outlook and Investment Strategies for the Current Landscape

3:45 PM – 4:15 PM **WHAT'S NEXT FOR THE JAPANESE EQUITY MARKET TOWARD 2024?**

Masatoshi Kikuchi, Pan-Asia Chief Equity Strategist, Equity Research Dept.
Mizuho Securities

4:15 PM – 4:45 PM **NEW PERSPECTIVES ON TRACKING JAPANESE EQUITIES, FEATURING THE JPX PRIME 150 INDEX**

Motohiro Hashimoto, Head, Index Business, JPX Market Innovation & Research

4:45 PM – 5:45 PM **PANEL DISCUSSION: INCORPORATING INVESTOR BEHAVIOR INSIGHTS INTO JAPANESE EQUITY STRATEGIES**

Moderator: Kazuhisa Mikami, Head of Sales, Japan, Jane Street

Panelists

- **Kenichiro Ono**, Senior Stewardship Officer, General Manager Stewardship Development Department, Sumitomo Mitsui Trust Asset Management
- **Masafumi Watanabe**, Head of ETF Business Dept, Managing Director, ETF Business Dept., Nomura Asset Management
- **Masatsugu Doi, CFA**, Managing Executive Officer, Equities & Derivatives Business Division, Rakuten Securities

5:45 PM – 5:50 PM **CLOSING REMARKS**

Ken Kobayashi, Head of Japan Office, S&P Dow Jones Indices

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Agenda subject to change.