



## Agenda

The Ballroom, Mandarin Oriental Hyde Park, 66 Knightsbridge, London, SW1

### Wednesday, 24 February, 2010

8:00	Arrival and registration begins	
8:45	Welcome remarks John Alexander, Chairman and CEO of LCF Edmond de Rothschild Securities	
9:00	<b>Genesis Investment Management</b> Andrew Elder	<i>Global Emerging Markets Equities</i>
9:30	<b>Pacific Alliance China Land</b> Pat Boot, Pacific Alliance Real Estate	<i>Chinese Real Estate</i>
10:00	<b>VinaCapital Vietnam Opportunity Fund</b> Andy Ho (CIO)	<i>Listed Equity, Private Equity and Real estate investment in Vietnam</i>
10:30	Coffee Break	
11:00	<b>Metage Capital</b> Richard Webb (CEO)	<i>Global / Emerging Markets Hedge Fund</i>
11:30	<b>Prosperity Capital Management</b> Mattias Westman (CEO) and Liam Halligan (Chief Economist)	<i>Listed equity investment in Russia and the former CIS</i>
12:15	<b>Pacific Alliance Asia Opportunity Fund</b> Chris Gradel (CEO), Pacific Alliance Group	<i>Value, arbitrage and special situations in Asia</i>
12:45	Buffet Lunch	
13:00	Lunch presentation – Guest Speaker <b>William Browder, Hermitage Capital Management</b>	
	<i>Indian Real Estate Funds</i>	
14:15	<b>Yatra Capital</b> Ajoy Kapoor (MD), Saffron Asset Advisors, Sir Nigel Broomfield (Chairman) & David Hunter (Director)	<i>Diversified, direct real-estate and related equity</i>
14:45	<b>Alpha Tiger Property Trust</b> Brad Bauman	<i>Diversified, direct real-estate and related equity</i>
15:15	<b>Trikona Trinity Capital</b> Ashesh Shah (Former MD)	<i>Diversified, direct real-estate and related equity</i>
15:45	<i>Presentations conclude</i>	
17:45	<i>Coach from Mandarin (Ballroom entrance) to Paramount Club</i>	
18:00	<b>Drinks, Paramount Club</b> , 31 <sup>st</sup> Floor, Centre Point, London WC1, 020 7420 2900	
18:45	<i>Coach from Mandarin (Ballroom entrance) to Paramount Club</i>	
19:30	<b>Dinner, Paramount Club</b>	<i>Dress code: Informal</i>



## Agenda

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Thursday, 25 February, 2010

- 8:30 Arrival and registration begins
- 8:45 Welcome remarks  
Claire Heathfield (Director), LCF Edmond de Rothschild Securities
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- 9:00 **Africa Opportunity Fund** *Value, arbitrage and special situations in Africa*  
Francis Daniels and Robert Knapp, Africa Opportunity Partners
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- 9:30 **EFG Hermes Asset Management** *MENA equities*  
Hashem Montasser (Head of Asset Management)
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- 10:00 **VinaLand** *Real estate investment in Vietnam*  
Don Lam (CEO), VinaCapital
- 10:30 Coffee Break
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- 11:00 **Reconstruction Capital II** *Private equity & listed small / mid-cap co's in Romania & Serbia*  
Ion Florescu, New Europe Capital
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- 11:30 **ARC Capital Holdings** *Private equity investment in Retail and Consumer sectors in Greater China*  
Allan Liu and Rachel Chiang, Pacific Alliance Equity Partners
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- 12:00 **Pátria Investimentos** *Brazil*  
Alexandre Saigh (Managing Partner) and Luis Fernando Lopes (Partner)
- 12:30 Buffet Lunch
- 13:00 Lunch presentation – Guest Speaker  
**Rick Sopher, Managing director, LCF Edmond de Rothschild Asset Management**
- East European Real Estate Funds*
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- 14:00 **Dolphin Capital Investors** *Residential / Resort development in South-East Europe*  
Miltos Kambourides (Managing Partner)
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- 14:30 **Tau Capital** *Public and private equity in Central Asia*  
Richard Horlick
- 
- 15:00 **Atlas Estates** *Central and Eastern European Real Estate*  
Michael Williamson (CFO)
- 15:30 *Conference concludes*



**Registration Form**

To reserve your place, please complete and return this form to Sophie Heslop by email to [funds@lcf.co.uk](mailto:funds@lcf.co.uk) or by fax to +44 (0) 20 7845 5961 at your earliest convenience.

Name:

Company:

Position:

Telephone:

E-mail:

- I would like attend the dinner on Wednesday 24<sup>th</sup> February  
Paramount Club, 31<sup>st</sup> Floor, Centre Point, London WC1, 020 7420 2900  
6.30 Drinks for 7.30 Dinner; Dress code informal

**Group-on-One meetings**

Managers will be holding small Group-on-One meetings throughout both days of the conference. Please register below.

*I am interested in meeting the following Managers:*

*Preferred day and time:*

Africa Opportunity Fund	Francis Daniels & Robert Knapp	<input type="checkbox"/>
ARC Capital Holdings	Allan Liu and Rachel Chiang	<input type="checkbox"/>
EFG Hermes Asset Management	Hashem Montasser	<input type="checkbox"/>
Genesis Investment Management	Andrew Elder	<input type="checkbox"/>
Metage Capital	Richard Webb	<input type="checkbox"/>
Pacific Alliance Asia Opportunity Fund	Chris Gradel	<input type="checkbox"/>
Patria Brazil	Alex Saigh & Luis Fernando Lopes	<input type="checkbox"/>
Pacific Alliance China Land	Pat Boot	<input type="checkbox"/>
Prosperity Capital Management	Mattias Westman & Liam Halligan	<input type="checkbox"/>
Reconstruction Capital II	Ion Florescu	<input type="checkbox"/>
VinaLand	Don Lam	<input type="checkbox"/>
Vietnam Opportunity Fund	Andy Ho	<input type="checkbox"/>
Alpha Tiger Property Trust	Brad Bauman	<input type="checkbox"/>
Atlas Estates	Michael Williamson	<input type="checkbox"/>
Dolphin Capital Investors	Miltos Kambourides	<input type="checkbox"/>
Tau Capital	Richard Horlick	<input type="checkbox"/>
Trikona Trinity Capital	Ashesh Shah	<input type="checkbox"/>
Yatra Capital	Ajoy Kapoor, Sir Nigel Broomfield & David Hunter	<input type="checkbox"/>