

# Self-Reliance 2021 program

**08:00-08:25 REGISTRATION**

## **Section I: Self-reliance and planning for the future in the shadow of the coronavirus**

The global economy is beginning to recover from the negative spiral caused by the coronavirus, but we do not yet know how the increasingly inevitable fourth wave will affect this fragile recovery. Although early in the pandemic, it seemed savings would also suffer, these fears were short-lived as household savings grew substantially in Hungary just as they did around the world. But what will happen to the extra savings stockpiled during the pandemic?

What will the fourth wave bring in the Hungarian savings market?

How do top Hungarian executives see the current situation of the savings market?

What tools can market players use to encourage long-term savings?

How will incumbents react to the emergence of fintechs and online investment service providers, which have come to the fore during the pandemic?

**Moderator: Zoltán Bán**, CEO, Net Média (Portfolio Csoport)

### **08:25 - 08:30 Welcome speech**

Speaker:

**Zoltán Bán**, CEO, Net Média (Portfolio Csoport)

### **08:30 - 08:50 What will the fourth wave bring in the Hungarian savings market?**

Speaker:

**Dr. Csaba Kandrács**, Vice President, MNB

**08:50 - 09:40 Panel discussion: How do top Hungarian executives see the current situation of the savings market?**

Conversation participants:

**Balázs Benczédi**, vezérigazgató, MKB-Pannónia Alapkezelő

**Balázs Kadocsa**,

**Álmos Mikesy**, elnök-vezérigazgató, Diófa Alapkezelő

**Bernadett Tátrai**, President - CEO, President of the Board, Fundamenta-Lakáskassza Zrt.

**Sándor Vízkeleti**, vezérigazgató, Amundi Alapkezelő Zrt., BAMOSZ elnök

**09:40 - 10:00 How good is it to grow old in Hungary?**

Speaker:

**Kata Tisza**, Expert in Intercultural Psychology, Executive Coach, TK CONSULTING

**10:00 - 10:20 Coffee break**

## **Section II: Wealth management and customer service at the highest level: Can Hungarian service providers come up with anything new?**

Assets managed by private banks also rose to a new record high during the pandemic, even as new, online world order made acquiring new customers substantially more difficult. Investment fund managers have not had it easy, either: while funds have successfully weathered the panic last spring, there has been a constant stream of new regulatory requirements, while the emergence of passive funds and online service providers has not made making a profit any easier. Meanwhile, cautious spending has begun worldwide after restrictions were eased early this summer, but the fourth wave is increasingly casting a shadow on markets and economies. Is it worth banking on volatility in the long term? What will happen to the Hungarian forint and to the value of savings? Can traditional investment products come up with anything new, or will the future belong to alternative investments and new trends?

News in the retail government security market: what will happen to the superbond?

The fourth wave is coming – Will markets remain volatile? How will the forint fare?

Property market overview: Is investing into real estate still worth it?

Alternative investments: Gold, oil, bitcoin

What are the future expectations of the private banking sector? Will the era of private bankers and personal meetings continue, or should we prepare for a virtual future?

Will they be able to acquire new customers and assets, or will the increasing wealth of existing customers drive growth in the future?

What will be the primary development targets in wealth management?

How will opportunities to make a profit change amidst increasingly tight regulatory requirements?

**Moderator: Krisztián Horváth**, Partner, Boston Consulting Group

**10:20 - 10:35 360-degree wealth management The role of Family Office in financial asset management**

Speaker:

**István Illés**, cégtárs és igazgatósági tag, Apelso Trust Zrt.

**10:35 - 10:55 ESG asset management at the highest level - What example has Western Europe set?**

Speaker:

**Bálint Fischer**, Chief Business Development Officer, Dorsum

**10:55 - 11:15 Investment funds' performance fees - What says the National Bank of Hungary?**

Speaker:

**Dr. Gábor Laki**, Director, Hungarian National Bank

**11:15 - 11:30 Sustainable investments - Global trends and future dilemmas**

Speaker:

**Sándor Vízkeleti**, vezérigazgató, Amundi Alapkezelő Zrt., BAMOSZ elnök

**11:30 - 12:20 Panel discussion: Wealth management and customer service: Can Hungarian service providers come up with anything new?**

Conversation participants:

**István Al-Hilal**, Director, Fidelity International

**Lajos Bencze**, Head of Erste World Segment, Erste Bank Hungary Zrt.

**Bálint Botos CFA**, Managing Partner, Forestay RE Fund Management

**Ildikó Katona**, CEO, iPrivate Banking Zrt.

**László Morafcsik**, Deputy CEO, Fundamenta-Lakáskassza

**12:20 - 13:30 Lunch break**

## **Section III: The future of regular savings - Will the willingness for self-reliance switch to a higher gear?**

Household assets kept in government securities, investment funds, bank deposits and shares have increased during the pandemic, but retirement savings and life insurances have also performed well. But will the market of regular savings be able to reach younger generations, something it had failed to do so far? What will happen to the concept of welfare funds?

Has the pandemic made Hungarians realise the importance of self-reliance? Retirement and regular savings: how will the market attract new customers? Now that the pension bond has been abandoned, will welfare funds be a solution to the pension problem?

What will happen to life insurances?

What new investment opportunities are pension funds using to attract customers?

**Moderator: Péter Kuruc, , EY**

### **13:30 - 13:50 The role of regular savings in Hungarian's self-reliance attitude**

Speaker:

**Győző Nyitrai**, Director, OTP Bank

### **13:50 - 14:10 News and trends in the Hungarian pension market**

Speaker:

**Dr. András Farkas**, Founder - Editor in chief, NyugdíjGuru News

### **14:10 - 15:00 Panel discussion: The future of regular savings and self-reliance products as seen by market players**

Conversation participants:

**Dr. András Farkas**, Founder - Editor in chief, NyugdíjGuru News

**Tamás Kálózdí**, Deputy-CEO, Groupama Biztosító Zrt.

**Dr. Gábor Kravalik**, Chairman, Önkéntes Pénztárak Országos Szövetsége (ÖPOSZ)

**András Lányi**, Managing Director, HUNPénzügyi Tervező Kft.

**Győző Nyitrai**, Director, OTP Bank

### **15:00 - 15:05 Closing remarks**

## **Portfolio Private Health Forum 2021**

Two events in one day!

For more info, [click here!](#)

Have the ripples of the new legal service status for health workers passed? Have HR issues been solved? Are there more doctors in private health care? Are they contractors or employees?

Waiting lists in public health care are getting longer and longer, boosting demand for private services

The effects of higher salaries for doctors in public health care

Cross-sector cooperation: insurers + health funds + private service providers + intermediaries What motivates them?

The role of industries built around private health care providers

Emerging digital players in the market: will they re-draw the map?