

VinaCapital
2013 Investor Conference

AGENDA

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15 October 2013

18:30 **Arrival cocktail dinner**

*Venue: Beach Club restaurant
(Accommodation: provided by
VinaCapital, Ocean Villas)*

16 October 2013

Danang – Ho Chi Minh City

Danang

9:00 **Check out following breakfast**

9:00-12:30 **Site visit to Danang main properties**

12:30-13:30 **Light lunch at the Golf Club**

13:30 **Depart for airport**

*Suggested flight to Ho Chi Minh City:
VN1317 3:15pm/4:25pm*

Ho Chi Minh City

19:00-21:00 **Welcome drinks**

*Purple Jade Bar
(at Intercontinental Asiana Saigon Hotel)*

AGENDA

17 October 2013

MAIN CONFERENCE

Intercontinental Asiana Saigon Hotel

- 08:30 - 09:00** **Registration**
- 09:00 - 09:15** **Welcome remarks**
Dr Jonathan Choi, Chairman
Don Lam, CEO
- 09:15 - 09:55** **Vietnam Investment update**
Government Representative
- 09:55 - 10:15** **“The Vietnam Real Estate Market and the valuation curve”**
Dan Hayden, Director National Valuations and Advisory, CBRE
- 10:15 - 10:35** **VinaLand Fund Update**
David Blackhall, Managing Director, VNL
- 10:35 - 10:50** **Tea Break**
- 10:50 - 11:10** **“Infrastructure Developments in Ho Chi Minh City”**
Ly Luong, Senior Advisor, Head of Investment and Trade Dept., VLT Lawyers
- 11:10 - 11:30** **Vietnam Infrastructure Fund Update**
Tony Hsun, Managing Director, VNI
- 11:30 - 11:45** **DFJV Fund Update**
Phuc Than, Managing Director, DFJV

- 11:45 - 13:15** **Lunch**
- 13:15 - 13:35** **Vietnam Stock Market**
Fiachra Mac Cana, Managing Director
Head of Research at HCM Securities Corp.
- 13:35 - 13:55** **Vietnam Opportunity Fund Update**
Andy Ho, Managing Director, VOF
- 13:55 - 14:25** **Opportunities in Myanmar**
Stewart Tong, Partner, General Pacific Group
- 14:25 - 14:50** **Q&A to all Funds’ MDs**
- 14:50 - 15:00** **Closing remark**
Terence Mahony, Vice Chairman
- 15:30 - 16:30** **Optional 1-on-1 meeting with fund MDs**
- 18:30 - 21:30** **Cocktail reception and dinner at KOTO Restaurant**

18 October 2013

- 9:00 - 12:00** **Option 1: Site visit – Ho Chi Minh City**
(Dai Phuoc Lotus, Century 21 & The Garland)
- 9:00 - 15:00** **Option 2: Investee company visits**
(Vinamilk, PNI)

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SPEAKERS

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Mr. FIACHRA MAC CANA,
*Managing Director, Head of Research
HCM Securities Corporation.*

Topic: Vietnam Stock Market

Mr. Fiachra educated in University College Dublin and graduated with a Bachelor of Commerce Degree. Strong track record with 18 years of experience in Investment Banking in London and Tokyo, co-founded JCN Network, and directed Research Department of WestLB, VinaCapital and VinaSecurities before joining HSC. Listed as one of the top 15 Japan strategists by Asia Money in 2003 and The Best Analyst in Vietnam by Institutional Investor & Asia Money in 2011.



Mr. LY LUONG,
*Senior Advisor, Head of Investment and
Trade Department, VLT Lawyers.*

**Topic: Infrastructure Developments in
Ho Chi Minh City**

Mr. Luong is currently the CEO of DNL Partners, an investment consultancy company. He has also held the position of Deputy Director of the Department of Planning and Investment in Ho Chi Minh City for six years and before that he was the Deputy Director of Foreign Affairs. He has had over 25 years of experience in Vietnam giving him a good understanding of both the government and the market. He attended the Graduate Institute of International Studies in Geneva, Switzerland.

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Mr. DAN HAYDEN

*Director National Valuations & Advisory
CBRE Vietnam*

**Topic: The Vietnam Real Estate Market
and the valuation curve**

Mr. Dan's role as National Director (Vietnam) focuses on business development and quality assurance, alongside completing specialist technical valuations on a country-wide basis.

With close to 20 years overall real estate industry experience, he has been a qualified Certified Practicing Valuer in Australia since 2001 and a Chartered Valuation Surveyor and member of the Royal Institution of Chartered Surveyors since 2004. Since joining CBRE International Valuations in 2007 in London, and more recently in Singapore, he has completed projects in over 40 countries, establishing a track record and demonstrated capabilities particularly in developments, re-developments, feasibilities and complex or unusual cash flow scenarios.

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INFORMATION

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CONTACTS:

For any inquiries related to the Conference please call:

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CONFERENCE VENUE:

All conference session on 17 October will be conducted at

Intercontinental Asiana Saigon Hotel

Corner of Hai Ba Trung and Le Duan St, Dist. 1, HCMC.

WELCOME COCKTAIL, LUNCHEON AND DINNER:

- Welcome Cocktail Reception on Wednesday, 16 October from 19:00 – 21:00 at **Purple Jade Bar, 1st FL, Intercontinental Asiana Saigon hotel**
- Luncheon on Thursday, 17 October will be served at **Intercontinental Asiana Saigon Hotel.**
- Dinner on Thursday, 17 October, from 19:00 at **KOTO Restaurant**
151A Hai Ba Trung St, Dist. 1, HCMC

Transportation to the Dinner venue will be provided to all guests, please be present at the hotel lobby at 18:20. Buses will leave **Intercontinental Asiana Saigon Hotel** at 18:30.

SITE VISIT TO VINACAPITAL REAL ESTATE PROJECT AND INVESTEE COMPANIES ON 18 OCTOBER:

Please be present at **Intercontinental Asiana Saigon Hotel** lobby at 8:50. Buses will leave hotel at 09:00 am.

IDENTIFICATION:

Please have your name badge with you at all times to ensure entry to the conference and related events.