



Friday, October 14, 2022

Hilton Mumbai International Airport, Sahar Airport Elevated Rd, Andheri East,
Mumbai - 400099. Maharashtra.

Agenda	
Speaker	Time
Breakfast (08:00 AM to 09:00 AM)	
Welcome Remarks by <i>Rajeev Thakkar</i>	09:00 AM to 09:05 AM
Prof. Sanjay Bakshi	09:05 AM to 10:45 AM
Tea Break (10:45 AM to 11:00 AM)	
Nihal Kulkarni converses with Neeraj Marathe	11:00 AM to 12:15 PM
Nitin Mangal	12:15 PM to 01:45 PM
Lunch (01:45 PM to 03:00 PM)	
Vikash Mantri converses with Amit Mantri	03:00 PM to 04:15 PM
Tea Break (04:15 PM to 04:30 PM)	
Kuntal Shah	04:30 PM to 06:00 PM
Closing comments by <i>Neil Parag Parikh</i>	06:00 PM to 06:05 PM

This order may be subject to change

Speaker Profiles

(In the order of Appearance)

Prof. Sanjay Bakshi

Adjunct Professor at FLAME University

Prof. Bakshi is one of India's best-recognised professors in the field of value investing and behavioural finance. He has taught at various institutions including twenty one years at MDI Gurgaon where he was elected by students as Best Professor for eleven of those years.

He joined Flame University recently as Distinguished Adjunct Professor - Finance.



At Flame, he teaches two programs at Flame Investment Lab. These are on Behavioral Economics and Case Studies in Business and Investment Analysis. He will also be teaching a course on Behavioral Economics to undergrad and grad students at Flame University. Prof. Bakshi is also developing new, innovative courses that will combine wisdom from multiple disciplines in the true spirit of interdisciplinarity, which is one of Flame University's key differentiators.

Prof. Bakshi received his M Sc. in Economics from London School of Economics and Political Science and B Com. (Hons) from University of Delhi. He is also a fellow member of the Institute of Chartered Accountants of India.

Mr. Nihal Kulkarni

Ex Managing Director of Kirloskar Oil Engines Limited (KOEL)

Nihal has industry experience in finance, investments, capital allocation, operations, and strategy. He began his career in senior management as Vice President at Kirloskar Pneumatic Company Limited from early 2005 until October 2010. This was followed by his first stint as Managing Director of Kirloskar Industries Limited (KIL) in October 2010. He took over as the Managing Director of Kirloskar Oil Engines Limited (KOEL) in January 2012.



At KOEL, Nihal's focus was the transformation of the business from a family run organization to a professionally managed business. He was instrumental in hiring professionals in top management positions, setting strategy, managing operations and capital allocation. In 2014, Nihal was selected by The Economic Times as one of the top 40 CEOs in India under the age of 40.

He resigned from all positions in the Kirloskar Group in February 2022 and intends to pursue a career as a private investor.

Nihal is an A.B. in Economics and Computer Science from Brown University, USA.

Mr. Neeraj Marathe

Founder - Sentinel Research and Investor

Neeraj is a Pune based investor-analyst. He has been a full time capital market participant for over 2 decades. He is the founder of Sentinel Research, an independent research service on Indian listed companies. He is also a regular contributor at FLAME Investment Lab.



Mr. Nitin Mangal

Research Analyst

Nitin is a SEBI registered Research Analyst with more than a decade of experience in Indian and global equities. He is a Pioneer in Corporate Governance and Accounting Research in the Indian Market, who has successfully developed a product for Institutional Investors known as 'Analysis beyond Consensus'. He has worked with Edelweiss Securities Ltd. Mumbai and later, he worked with Veritas Investment Research Corporation Canada, as an Asian consultant covering Indian and US equities.



He has also been profiled by the leading financial newspapers such as Wall Street Journal, Business Standard and more.

Nitin is also an insight provider on Smartkarma, a Singapore based research platform of independent analysts for global institutional investors. He is also the founder of Nitin Mangal Corporate Advisors Private Limited, which provides investment consultancy to North American Portfolio Managers for their investment in US equities.

Mr. Vikash Mantri

Recreational Poker Player and Investor

I have been a Sell-side Equity Analyst covering sectors like Media, Telecom, and Consumer Midcaps from 2004-2019. I was at SBI capital markets from 2004-2007 and at ICICI Securities from 2007-2019.

I was rated by Institutional Investor as the best analyst for Media – India for 2014-16.

I am a Recreational Poker player and was the winner of the First ever WPT Indian Main event.

I have dabbled a bit in Theatre. I am an avid movie watcher and hope to travel around the globe.



Mr. Amit Mantri

Principal Officer at 2Point2 Capital PMS

Amit has 12 years of investing experience across private equity and public markets in India. He is currently the Principal Officer at 2Point2 Capital PMS which has assets under management of ~700 crores. He has previously been part of the investment teams at Hornbill Capital, IDFC Alternatives and Zephyr Peacock India.



Amit has a Post-Graduate Diploma in Management from IIM Bangalore and a B.Tech in Computer Science and Engineering from IIT Kharagpur. He is also a CFA® charterholder.

Mr. Kuntal Shah

Partner at Oaklane Capital Management LLP

Mr. Kuntal Shah is a Partner at Oaklane Capital Management LLP and has an opportunistic inclination towards a value-oriented and risk-controlled approach to investments. He has almost three decades of experience in various capital market-related activities. In the past, he has added value through strategic inputs, networking and competitive intelligence, and board-level decision making for the investee companies.



Mr. Shah has an in-depth understanding of value investing with a focus on risk identification and mitigation, emerging trends and opportunities in key growth sectors in India, taxation and accounting. He loves to teach on these subjects and in the past, has lectured at UTI Institute of Capital Markets, IIM-Ahmedabad, IIT-Mumbai, Symbiosis, FLAME University and Chartered Accountants Institute, Mumbai. He received his degree from Pune University in Electronic Engineering and has been a successful investor over the past two decades.