



Friday, October 13, 2023

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
Karthik Tiruvarur	09:05 AM to 10:30 AM
Tea Break (10:30 AM to 10:45 AM)	
Abhishek Singh	10:45 AM to 12:00 PM
Nikhil Nigania	12:00 PM to 01:30 PM
Lunch (01:30 PM to 02:45 PM)	
Saurabh Singh	02:45 PM to 04:15 PM
Tea Break (04:15 PM to 04:30 PM)	
Shekhar Daga	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)

Mr. Karthik Tiruvarur

Lead - Consumer Tech (Global, ex-fintech)

Karthik Tiruvarur, based in Washington DC, leads investment in early-stage consumer technology companies for International Finance Corporation (IFC) which is the private sector focused arm of the World Bank. Through its \$100bn balance sheet, IFC invests across the globe in category defining companies and VC and PE Fund Managers. As part of IFC's venture capital team, Karthik's investment focus has been in growth stage technology companies in geographies spanning India, China, Latina America and Middle East.



Investments in India include consumer technology companies such as Lenskart, Nephroplus, Bigbasket, Shadowfax technologies, 1mg etc.

Karthik has a very deep interest in studying the confluence of Buffett's value investing approach applied to private markets and to cross over investments. Karthik's stint at IFC gives him a unique vantage point of looking at investments from early-venture stage to holding them all the way through post IPO, as well as understanding the workings of Private Equity Fund Managers through IFC's role as a Limited Partner in leading VC and PE firms.

Karthik has a B.Tech in Computer Science from IIT Madras and an MBA from Kellogg School of Management. He started his career with Lehman Brothers and has a 15+ year career in financial services in addition to a two year stint running a healthcare startup in rural India.

Presentation Title:

Tech companies - Perspectives from private markets for public investors

Format:

This will be explored through a short presentation by Karthik Tiruvarur following a conversation between him and Aneesh Reddy, founder of IPO-bound Capillary technologies, an Indian Saas company.

Mr. Aneesh Reddy Boddu

Founder, Chairman and ex-CEO of Capillary technologies

Aneesh Reddy Boddu is the founder, Chairman and ex-CEO of Capillary technologies, a SaaS company that helps large enterprises manage their customer loyalty. Capillary tech currently has more than 250 customers who account for some 120,000 stores around the world, touching a billion end-consumers in over 30 countries, who collectively make about five billion transactions a year. Capillary tech counts investors such as Sequoia Capital, Warburg Pincus as its backers and filed its RHP in 2022 as a precursor to an IPO.



Aneesh holds a bachelor's degree in Manufacturing Science and Engineering from the Indian Institute of Technology, Kharagpur. At IIT KGP, he co-founded the Entrepreneurship Cell and was awarded the "Distinguished Alumnus Award" by the institute in 2017, a rare honor for someone below the age of 35. In 2014, he was recognised by Fortune India magazine as one of the "40 under 40 - India's Brightest Young Business Minds" and in 2017, he was recognised by Economic Times under the "ET 40 under Forty" list. He started his career at ITC Limited in 2006 and founded Capillary Technologies in 2009.

Aneesh is a very prominent angel investor and has mentored countless founders through the past 15 years. Aneesh's very close association with iSprit Foundation and Saasboomi are a testament to his commitment to strengthen and give back to the software ecosystem in India.

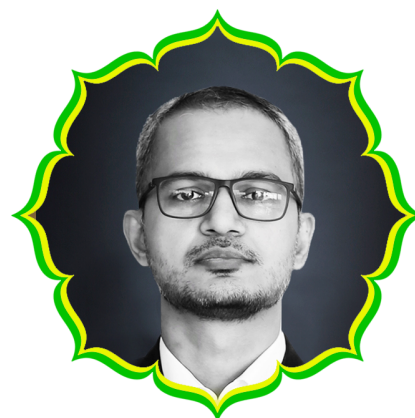
Mr. Abhishek Singh

Fund Manager at DSP Mutual Fund

Abhishek is a Fund Manager at DSP Mutual Fund. He has worked with the proprietary trading desk of Kotak Mahindra Group and Edelweiss in the past. He is an Electrical Engineer from IIT, Kanpur and has a Post Graduate Diploma in Management from IIM, Lucknow.

Presentation Title:

Faith Vs. DCF: Confessions of a puzzled investor



Mr. Nikhil Nigania

Director- Senior Research Analyst at Sanford C. Bernstein, India Industrials and Infrastructure

Nikhil joined Bernstein in 2021 as a senior analyst covering India industrials and Infrastructure. Prior to Bernstein, Nikhil spent 11 years in management consulting, most of which was with Boston Consulting Group where he was a Principal in their Delhi office. There, he advised client CxOs and senior government executives in the Industrial Goods and Energy practice, focusing on clean energy, power sector policy, and large-scale infrastructure in India.



Nikhil has done Electrical Engineering - from IIT Bombay and has an MBA from XLRI

Presentation Title:

India's Energy Transition

Mr. Saurabh Singh

Founder of a SAAS product in beta (AddressBook+)

Saurabh Devendra Singh has over 20 years of experience in various financial markets globally. He is currently the founder of a SAAS product in beta (AddressBook+). Prior to this, Saurabh helped lead Sanford Bernstein as a leading Brokerage house in India in his capacity as the Chief Business Officer and has been the founding member of Barclays Institutional Equities business in India. Pre-GFC Saurabh was an investor as a portfolio manager with ABN Amro (London).



As an afficionado on the intersection of technology & finance landscape, Saurabh has worked extensively with corporate and financial institutions to help leverage and evolve/disrupt traditional businesses. Saurabh is an Alumnus of the Indian institute of technology, Delhi and the Indian Institute of Management, Ahmedabad. His hobbies include reading, writing and programming.

Presentation Title:

Making Sense of Chaos: Stock Brokers' Survival Guide

Mr. Shekhar Daga

Head- Private Capital at ICICI Prudential AMC

Mr. Shekhar Daga is the Head- Private Capital at ICICI Prudential AMC. In a career spanning over two decades, Shekhar has handled the entire gamut of investment management across corporate lending, structured finance, private equity, special situation and distressed debt resolution. Shekhar is currently managing the Private Credit Funds at ICICI Prudential AMC in their Alternative business.



Previously, he was a partner at AION Capital, a India focused Special situation fund (a JV between Apollo Global Management and ICICI Venture) and served on the board of multiple portfolio companies. He was earlier with ICICI Bank in their Corporate finance and Distressed Debt group in Mumbai and London. He started his career with UTI Mutual Fund in their Investment Department. Shekhar is a rank holder CA from Institute of Chartered Accountants of India.

Presentation Title:

Private Credit : FAD, FOMO or REAL?