

Morningstar Investment Conference

November 2, 2011 – Mumbai

Speakers' Biography

Internal Speakers

Joe Mansueto
Chairman and Chief Executive Officer
Morningstar, Inc.

Joe Mansueto founded Morningstar in 1984. He has served as chairman since the company's inception, and as chief executive officer from inception to 1996 and from 2000 to present.

In October 2010, Mansueto received a Tiburon CEO Summit award, and MutualFundWire.com named Mansueto ninth on its list of the 100 Most Influential People of 2010. Mansueto received the 2007 Skip Viragh Award, sponsored by Rydex Investments and *Financial Advisor* magazine, which recognizes new and innovative services that positively impact the financial advisor community.

In 2007, the *Chicago Sun-Times* and Kuczmarski & Associates awarded Mansueto their 2007 Visionary Award, and included him among 10 winners of the 2007 Chicago Innovation Award. Also that year, *SmartMoney* magazine recognized Mansueto in the "SmartMoney Power 30," its annual list of the top 30 most powerful forces in business and finance. He received the Distinguished Entrepreneurial Alumnus Award from the University of Chicago Graduate School of Business in 2000.

In 1993, he was given the KPMG Peat Marwick High Tech Entrepreneur of the Year Award, and in 1992 won the Rosenthal Award for Excellence in Investment Research from the University of Chicago.

Before founding Morningstar, Mansueto was a securities analyst at Harris Associates. He holds a bachelor's degree in business administration from the University of Chicago and a master's degree in business administration from the University of Chicago Graduate School of Business.

Heather Brilliant
Vice President,
Global Equity and Credit Research,
Morningstar, Inc.

Heather Brilliant is vice president of global equity and credit research for Morningstar. In this role, she leads the equity and credit research teams, consisting of more than 100 analysts and directors.

Prior to her current role, Ms. Brilliant held several positions as an equity analyst at Morningstar and two boutique investment management firms. She has covered a variety of sectors, including pharmaceuticals, biotechnology, business services, and retail. She started her finance career at Bank of America as a corporate finance analyst covering the auto industry.

Ms. Brilliant holds a bachelor's degree in economics from Northwestern University and a master's degree in business administration from the University of Chicago Booth School of Business. She holds the Chartered Financial Analyst (CFA) designation, and is currently the chairman of the board of the CFA Society of Chicago.

John Rekenthaler CFA
Vice President,
Research & New Product Development,
Morningstar, Inc.

John Rekenthaler, CFA is vice president of research for Morningstar. In this role, he oversees Morningstar's research methodologies and is involved in a variety of new development efforts. His recent projects in 2009 include the launches of the Morningstar Target-Date Fund Series Rating and Research Reports and the Morningstar Global Fund Investor Experience Survey.

Rekenthaler previously served as president of Morningstar Associates, LLC, a registered investment advisor and wholly owned subsidiary of Morningstar, Inc.

Prior to his position at Morningstar Associates, he was the firm's director of research, where he helped to develop Morningstar's quantitative methodologies, such as the Morningstar Rating™ for funds, the Morningstar Style Box™, and industry sector classifications.

Rekenthaler holds a bachelor's degree in English from the University of Pennsylvania and a master's degree in business administration with high honors from the University of Chicago Graduate School of Business. He is a member of the CFA Society of Chicago.

Paul Justice, CFA
Director of ETF Research – North America, Editor of Morningstar ETF Investor, Morningstar, Inc.

Paul Justice, CFA is Morningstar's Director of ETF Research in North America. In addition to managing the group's eight North American research analysts, he is also the editor of ETFInvestor, Morningstar's monthly ETF news and investment publication.

Prior to joining the ETF team, Mr. Justice was a senior equity analyst and team leader covering the utility industry. He joined Morningstar in October 2004, after working several years as a credit analyst at Merrill Lynch.

Justice holds a bachelor's degree in economics from the University of Illinois at Urbana-Champaign and a master's degree in finance from DePaul University. He also holds the Chartered Financial Analyst (CFA) designation.

External Speakers

(Arranged in alphabetical order)

Ashu Suyash
MD & Country Head-India
Fidelity International

Ashu Suyash heads the Indian branch of Fidelity, the world's largest fund manager. Fidelity Fund Management, an arm of Fidelity International Ltd, along with Fidelity Management & Research Company, Boston, US, has $1.2 trillion assets under management. And Suyash took over as head of its mutual funds business in India in 2004.

A chartered accountant by qualification, Suyash, 37, brings with her over 15 years of experience in the financial services industry. She has earlier worked with Citicorp Brokerage India Ltd as CEO (1996-1998) and as head of investor sales (1998-2000). She also did a year's stint with Timesofmoney.com. Before her present job, she was head of strategy and business development for Citigroup in India. Suyash recently relaunched Fidelity's flagship equity scheme, Fidelity Equity Fund, with the objective of shifting focus from new fund offers (NFOs) to existing schemes.

Chaitanya Pande
Head, Fixed Income
ICICI Prudential AMC

Chaitanya Pande heads the Fixed Income team at IPRU AMC, having joined in September 2002.

He has an overall work experience of around over 14 years. His core competency lies in credit analysis and efficient portfolio management. His efficiency in fund management also won him the title of India's Most Astute Bond Investor by Asset Magazine for the year 2007. He manages the largest fixed income funds in the industry in India.

Chaitanya holds a MBA from IMI Delhi. Prior to joining ICICI Prudential AMC he was with Jardine Fleming AMC Pvt Ltd. He loves reading. He also has a keen interest in golf and is working towards mastering the game.

Madhu Kannan
MD & Chief Executive Officer,
BSE Ltd.

Madhu Kannan was appointed the chief executive officer at the Bombay Stock Exchange (BSE) in May 2009. Kannan is the former vice president, of Europe, Middle East and Africa operations for NYSE Euronext and was previously the special assistant to the head of international of NYSE, as well as a research associate within the exchange's research department. From August 2002 until December 2005, Kannan had been managing director, Asia-Pacific, supporting the exchange's initiative in emerging markets.

Prior to that he was account manager, from 2001 to 2002. Kannan earned an undergraduate degree (B.E. with honors) in electrical engineering and a M.Sc with honors, in economics from BITS, Pilani, India, in addition to a MBA in finance from Vanderbilt University in the U.S. Kannan was nominated as a Young Global Leader in 2007 by the World Economic Forum, based in Geneva, Switzerland.

Navin Suri
MD & Chief Executive Officer,
ING Investment Managers (I)
Private Ltd.

Navin is a Director on the Board of AMFI and has 20 years of rich experience in the sales & distribution and wealth management spectrum.

He has worked for 15 years across several parts of India and for over 5 years he has worked across 13 markets in Asia (while being based in Singapore).

His last assignment with Citibank as the Head of Sales & Distribution for the retail bank for Asia-Pacific, saw him operate with and influence performance of over 2000 sales personnel based at 400 distribution points across Asia – in highly sophisticated markets such as Hong Kong & Singapore, to markets with complex distribution networks as Korea, to emerging Asian markets like Malaysia, Philippines and Indonesia.

Navin has completed his Masters in Business Management from Mumbai University.

Nitin Rakesh
CEO, Motilal Oswal
Asset Management Co. Ltd.

Nitin has over 13 years of extensive experience of working in the financial services sector. His core competence lies in investment management and handling operations. He also has a deep understanding of diverse areas including asset management, transaction processing, offshore fund structuring and venture capital.

In his prior assignment, Nitin served as the CEO and Executive Director of State Street Syntel Services, the joint venture between State Street Bank (NYSE: STT) and Syntel (NASD:SYNT).

He was also the business unit head of Syntel's BPO arm and played an integral role in helping build a new business for the company which emerged as one of the most profitable in the industry with annual revenue of over $ 100 million. In addition, he has held various positions in organizations such as TCG Investments and Unit Trust of India (UTI Mutual Fund). Nitin holds a B E (Computers) from Delhi College of Engineering and an MBA in Finance from NMIMS,
Mumbai.

Rajiv Anand
MD & Chief Executive Officer,
Axis Asset Management Co. Ltd.

Rajiv Anand is the MD and CEO of Axis Asset Management Company Ltd (Axis AMC). He is also a Non Executive Director on the Board of Association of Mutual Funds in India. A Chartered Accountant with over 19 years experience in capital markets, Rajiv is equipped with considerable experience and knowledge of the fund industry.

Prior to Axis AMC, Rajiv has led an award winning investment management team at the erstwhile Standard Chartered AMC. Rajiv has also worked with the Treasuries of HSBC and Standard Chartered Bank. Rajiv was Business Standard's Debt Fund Manager of the year in 2004.

S. Nagnath
President & CIO,
DSP Blackrock Investment
Managers Pvt. Ltd.

Naganath is the President and Chief Investment Officer of **DSP BlackRock Investment Managers Pvt Ltd.** He worked with DSPBRIM from its inception (1996) to October 1999 as Chief Investment Officer. He then worked for Credit Suisse Asset Management, New York as a portfolio manager for international equities before re-joining DSPBRIM in 2002 as Joint President and Chief Investment Officer. Prior to his initial position at DSPBRIM, he had worked in Hong Kong as a portfolio manager with Merrill Lynch Asset Management and GT Management.

Naganath holds a Bachelor of Commerce degree from Madras University and a PGDM from the Indian Institute of Management, Ahmedabad

Sandesh Kirkire
CEO, Kotak Mahindra Asset
Management. Co. Ltd.

Mr. Sandesh Kirkire, 47, is a Mechanical Engineer, and holds a Masters degree in Management Studies from Jamnalal Bajaj Institute of Management Studies (JBIMS), Mumbai University. Mr. Kirkire joined Kotak Mahindra Group in 1994.

He has over 21 years of experience in financial services spanning Corporate Finance, Investment Banking and Funds Management. Mr. Kirkire has been with Kotak Mahindra Asset Management Company Ltd. since 1999.

Sundeep Sikka
CEO, Reliance Capital Asset
Management Ltd.

An MBA from Pune University with specialization in Finance & with a rich experience in the financial services sector, Sundeep went on to lead Reliance towards tremendous growth of assets, from less than $1 billion to over $24 billion at present to emerge as the largest and the most trusted mutual fund enjoying rapid yet balanced, sustained growth recognized for strong internal processes and robust risk management practices.
Sundeep also plays an active role in representing the Industry. He is the Vice Chairman and Director of the Industry Body, AMFI and has been championing the cause of increasing investor awareness and retail penetration, amongst many other such initiatives. He is also Director, Financial Planning Standards Board (FPSB), advocating and promoting financial literacy.

Sundeep Sikka is among 30 Select people in Asia, who has been featured in a book on "Decision Makers Investment Funds Asia - 2010" published by Clearstream Banking (Deutsche Borse Group). He has also been covered as one of India's Top Young Executives by the magazine Business India.

Vikram Kuriyan
PhD, CFA
Director of the Investment
Centre, Clinical Professor of
Finance, ISB

Dr. Kuriyan is Director of the Centre for Investments and a member of the faculty at the Indian School of Business. Previously, he was Chairman of the Global Asset Allocation Committee and global head of Quantitative Strategies at Bank of America's asset management division. His unit managed over billions of dollars of client assets that ranged from retail to the most sophisticated institutional investors, across a multiplicity of strategies including equity, asset allocation and absolute return products.

Earlier, Dr. Kuriyan served as managing director of an arbitrage and principal investing fund in Tokyo and as the global head of complex derivatives in the commodities group at Merrill Lynch. Dr. Kuriyan earned his Ph.D. at Harvard University where he specialized in capital markets in a joint program offered by the Departments of Economics, Engineering Sciences and the Harvard Business School. He also spent a year in the M.B.A program at the Harvard Business School and received a Masters degree in Applied Mathematics from Harvard University.

He has a B.S. in Electrical Engineering from the Massachusetts Institute of Technology, where he was elected to Tau Beta Pi and Eta Kappa Nu. He is a Chartered Financial Analyst and has appeared on television shows, including CNN. He has lectured at Cornell University, Washington University, the University of Lausanne, National University of Singapore.