

The Art & Science Behind Navigating a New Investment Reality in 2023

Janus Henderson Investors will host a private discussion event in Singapore at the Four Seasons Hotel on March 2 for gatekeepers, DPM heads and investors in the public and private sector wealth community.

The event, which will also feature top-level speakers from around the globe participating remotely, will thereby comprise presentations from Janus Henderson global experts, as well as panel and roundtable discussions involving high-level external speakers from leading global financial centres in Europe and the US. The forum has been designed to highlight some interesting and timely investment themes that Janus Henderson's eminent research and investment teams believe should be striking chords with private as well as institutional investors in the current climate.

Hubbis met with Andrew Hendry, CEO Singapore and Head of Asia Distribution at Janus Henderson, to learn more. He explained that the event is set against an investment climate that has changed quite dramatically from 2022, and said the firm wants to position itself as an early mover in promoting some key investment themes they believe will help reflective, cautious as well as more bullish investors perform well in 2023.

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**ANDREW HENDRY**

Janus Henderson Investors

This includes property, technology innovation, biotechnology, healthcare, and also hedge funds/liquid alternatives.

Andrew explains that through dialogue to identify the needs of institutional investors and the private wealth community such as gatekeepers, heads of discretionary management, CIOs and others there are three key types of investors he believes will benefit from the themes discussed at the Janus Henderson Asia Investment Summit 2023, subtitled Navigating a New Investment Reality.

The first type of investor comprises those who are highly focused on inflation and rising rates, how those will evolve and how to address them.

The second category comprises those with significant ongoing risk aversion to overcome, especially those who were badly bruised in 2022.

The third camp are more optimistic investors and strategists hunting for the right

ideas to make good returns in 2023 and beyond.

“We have structured the event to address all these rather different views, concerns and objectives,” Andrew reports.

He says that for those particularly cautious about higher rates and inflation, they have a presentation from Tim Gibson, Co-Head of Global Property Equities and Portfolio Manager, and, Andrew reports, a genuine expert on the market. “We have seen how higher and rising rates have had a major impact on REITs such as through the Blackstone BREIT, but Tim’s position is that property, if approached correctly,

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has significant value as an asset protecting against inflation. And the secret is the right strategy to adopt in today’s environment.”

For the second category of investors who want to protect their portfolios in 2023, liquid alternatives - in the form of hedge funds - beckon, Andrew reports.

“Liquid alternatives have been a key theme amongst the private banks and more broadly the institutional investor community since the markets turned downwards in early 2022 and since so many people lost money,” he reports. “The only way you

could make money, or at least preserve capital, was to diversify for downside protection through hedge funds that are sourcing in non-correlated returns and that have a protection component. Our expert speaker will highlight both the logic and the opportunity in this type of approach.”

For the third category of investors – those who are more optimistic and hunting for investment exposure amidst what they believe could be a rapid and strong recovery – the event will highlight innovation in the areas of technology, biotech and life sciences.

Andrew says the event will be quite intimate, with around 60

selected guests, and as well as the Janus Henderson experts and fund managers, will involve some high-level third-party speakers from major firms and institutions such as Credit Suisse, Nomura, UBS Global Wealth Management, Mercer, and also the Singapore Management University.

Andrew says the event will be ‘hybrid’ in that it will be live at the Four Seasons in Singapore, but draw on totally global expertise and participation from guests from the region unable to attend in person. “We will thereby bring together an incredibly interesting

mix of speakers and attendees,” Andrew explains.

The event is of course targeted at senior asset owners from institutions and government-linked investors such as insurance funds and pensions, from private banks, such as gatekeepers, CIOs, and DPM heads, and also representatives from multi-family offices and EAMs, as well as the high-profile external speakers Janus Henderson has lined up.

“The idea is to have an intimate forum to exchange ideas amongst different types of experts who will also benefit from networking with each other in a relaxed and hopefully quite pleasant

environment,” Andrew explains. “The concept is to have our own expert speakers, but also expert guests, all of whom will feed off each other’s different areas of specialisation and interest, and many of whom will have different viewpoints on the near-term and longer-term future.”

Andrew closes the short conversation by noting that Janus Henderson Group is a leading global active asset manager dedicated to helping investors achieve long-term financial goals through a broad range of investment solutions, including equities, fixed income, multi-asset, and alternative asset class strategies.

As of December 31, 2022, Janus Henderson had approximately USD287 billion in assets under management, more than 2,000 employees, and offices in 23 cities worldwide. Headquartered in London, the company is listed on the NYSE and in Australia on the ASX.

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The Janus Henderson Investors Asia Investment Summit 2023

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