



**TALK ON UNDERSTANDING RISK, OPPORTUNITIES & STRATEGIES IN  
 FIXED INCOME INVESTMENT**  
 (Organised by Seniors Special Interest Group, IEM)

Date : **8<sup>th</sup> October 2014 (Wednesday)**  
 Time : **5.30 pm to 7.30 pm** (Refreshments will be served at 5.00pm)  
 Venue : **TUS and C&S Lecture Rooms, 2<sup>nd</sup> Floor, Wisma IEM, Petaling Jaya**  
 Speakers : **En. Sidek Ismail (Senior Manager, Corporate & Institutional Investors)**  
**Mr. Terry Tan (Senior Fund Manager)**

**SYNOPSIS**

As Warren Buffett has said many times, "Risk comes from not knowing what you are doing". At OpusAM, we always evaluate on the risks involved when making investment decisions in order to achieve the investment objective of our clients.

This Talk is to introduce the general concept of risk to engineers and for engineers who would like to know more about risks in investing in Fixed Income. We will share our knowledge and experience on the risks in general and specifically the risks and rewards of Fixed Income Investment, what to consider when choosing a fixed income portfolio/fund and much more... It is our aim to assist engineers to become more knowledgeable about fixed income market and investment. We hope that with a deeper understanding of risk, the knowledge will be beneficial to the engineers and specifically as informed investors, it will be easier for engineers to make better decisions regarding their investment objectives and thus will allow them to sleep peacefully even during periods of market volatility.

We will be pleased if you could attend to hear our panel of experts share their knowledge and experience on risk in decision making and the opportunities and strategies in the fixed income market. The topics that will be shared are as below:

- Risk- Definition in General
- Risk Management : Fixed Income
- Why Invest in Fixed Income?
- What are Fixed Income Securities?
- Fixed Income Market
- How to Invest in Fixed Income?
- Fixed Income Market Outlook & Strategy

**BIODATA OF SPEAKER**

**Terry Tan Theam Swee, Senior Fund Manager**

Mr. Terry Tan is the Senior Fund Manager of Opus Asset Management (OpusAM). He has over 25 years of experience in the financial market. He started his career at Arab Malaysian Merchant Bank in 1989. He then joined Great Eastern Life Assurance Malaysia Berhad in 1997 as Manager, Fixed Income and was subsequently promoted to Vice President where he headed the Fixed Income Investments Department, managing a fund size of about RM20 billion. In 2007, he joined Avenue Invest Berhad for 2 years as Director/Head of Fixed Income. Prior to joining Opus, Terry was attached to Kenanga Investment Bank Berhad as Head of Fixed Income and Senior Vice President, Portfolio Management from 2009 until 2013.

Mr. Terry Tan is a member of the Persatuan Pasaran Kewangan Malaysia (PPKM) and a Certified Financial Planner (CFP). He holds an Advanced Diploma in Business and Management from University of Wales. He is also a holder of a Capital Markets Services Representative's Licence.

**Sidek Ismail – Senior Manager, Corporate & Institutional Investors**

Encik Sidek Ismail is the Senior Manager, Corporate & Institutional Investors for Opus Asset Management (OpusAM). He started his career with Bank Negara Malaysia (BNM) in 1986. During his tenure with BNM, he was posted to its New York Representative Office, USA for 3 years. His working experience in BNM included managing US Treasury Securities as well as Euro fixed income securities. In 1997, Encik Sidek joined Gadek Asset Management Sdn Bhd (later known as Phileo Asset Management Sdn Bhd) whereby he was responsible to manage domestic fixed income portfolios. Later in 2001, he joined Apex Investment Services Bhd to manage various conventional and Syariah unit trust funds.

Encik Sidek has more than 16 years of combined experience in managing foreign exchange, fixed income as well as equity portfolios. He also has a few years of experience in business development.

Encik Sidek holds a Bachelor of Business majoring in Accounting and a Master of Business Administration degree from Western Illinois University, USA. He currently holds a Capital Markets Services Representative's Licence.

**Ir. Khor Hock Keat**

Chairman  
 Seniors Special Interest Group, IEM

**NO CPD HOURS**

**ANNOUNCEMENTS TO NOTE:**

- Preferential admission to talk shall be accorded to IEM members (**pre-registration and online registration are NOT required**). (**telephone and/or fax reservation will NOT be entertained**)
- **Non members** may also attend the talk but will be charged a registration fee of **RM50** and an administrative fee of **RM10**.
- For affiliate members, there will be no registration fee. However, they are requested to produce their membership card as proof of membership. For the list of affiliates, please refer [www.myiem.org.my/content/memorandum\\_of\\_understanding-469.aspx](http://www.myiem.org.my/content/memorandum_of_understanding-469.aspx).
- Limited seats are available on a "first come first served" basis (maximum 110 participants).
- IEM members are required to produce your membership cards for confirmation of attendance (CPD purpose).
- Latecomers will not be allowed to enter if the lecture hall is full nor be entitled to CPD.

***IEM members who fail to produce their membership cards will be charged a fee of RM20.00.***

**FUNDS FOR IEM BUILDING FUND**  
**(WISMA IEM)**

- Kindly be informed that IEM will be charging participants **RM10** as administrative fee for talks organized by IEM.
- The fee would be used to cover overhead costs, building maintenance expenses as well as to support the purchase of the new building.
- All contributions will be deeply appreciated by IEM
- Students are however exempted.

Your understanding is greatly appreciated.

**ATTENDANCE CONFIRMATION**

Name: .....

Membership No: .....

Signature: .....