



4th Annual Family Office Forum

11th April, 2025

Taj Mahal Towers Colaba, Mumbai

- BY INVITE ONLY -

Tentative Agenda

Private & Confidential. Not for distribution.

Register Now

Should you wish to know more, please connect with Ritika Aggarwal: ritika@aikyaconnect.com | +91 90227 65966

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None of us is as smart as all of us

- Ken Blanchard

We've poured our passion into crafting this Forum, and we hope you'll find it as enriching as we did while putting it together!

In 2021, Aikya Connect was born out of a personal need I discovered while operating our single-family office (SFO) over the past decade. Recognising the immense value of advice from peers managing their own family offices, I saw a critical need for SFO CIOs to connect, share, and learn in a private, confidential setting.

Over the last four years, Aikya Connect has evolved into a thriving network, drawing large SFOs from India, the Middle East, and Asia. Our member CIOs, collectively overseeing USD \$28 Billion in assets, convene twice a month in unique call formats to exchange insights and intelligence on investments. What sets us apart is not just our professionalism but the friendships that have blossomed among

peers – a testament to the camaraderie within our community.

The Forum's format remains true to Aikya Connect's ethos of discretion and education. Comprising key family members and executives from single-family offices, the program is meticulously designed to cater to your interests as a family office. It facilitates interactions that foster valuable peer perspectives on pertinent topics and cultivates peer relationships - a cornerstone of our network.

- Jai Rupani

Head, Dinesh Hinduja Family Office &
Chairman, Aikya Connect

Join us for an exclusive gathering with **65+ leading Single Family Offices** to explore **Investment insights & Asset Allocation Trends for 2025.**



The Investment Network For Single Family Offices Investing Into India

Aikya Connect is an invite-only, non-commercial, single-family office network focused on curating digital spaces and events, driving conversations that build intelligence and foster growth amongst our members.

70+

FAMILY OFFICES

\$28B+

COLLECTIVE AUM

14+

ASSET CLASSES

100+

CALLS IN 46 MONTHS



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None of us is as smart as all of us!

KEN BLANCHARD

Core Founding Philosophy

"Unity & Oneness"

An exclusive investment network for senior investment professionals and wealth owners of single family offices. Members at Aikya Connect engage over multiple formats through the year to

Connect | Share | Learn



One for all: All for One

A network that looks to solve each other's challenges



Strong value system

Open, Collaborative and Supportive



Close Engagement

2+ calls a month across asset classes



"There aren't many conferences truly designed with the family office in mind. Most events aim to sell products or promote funds. Aikya Connect stands out because it focuses on fostering genuine connections among family offices, addressing not just investments but the broader aspects of being a family office. Jai Rupani has captured this essence because, as a family office himself, he understands these unique needs. This forum is built with the client in mind, not the seller."

Ahmed Husain

Global Head Family Offices, Neuberger Berman, UK



"One of the greatest strengths of Aikya Connect is its discretion - individual members and discussions remain confidential, which is a truly valuable asset. Being one of the initial members, my journey with Aikya has been nothing short of wonderful. It has been an enriching educational experience that has improved me professionally. The group discussions have often clarified my thought processes, reinforced my perspectives, and at times, made me take a second look at my ideas, helping me focus and grow."

Rohinton Bharucha

Strategic Advisor, Patni Family Office



"For me, the greatest value of Aikya Connect lies in its human capital. At our family office, we view learning as an ongoing journey, and Aikya has been a vital part of that process. When we were setting up our family office and even after, joining Aikya gave us access to invaluable perspectives and guidance from experienced members in the family office space. It helped shape our thinking about markets, risk, and the economy.

The smaller, focused conversations within the community are incredibly qualitative, allowing us to dive deep into specific issues. More importantly, Aikya fosters camaraderie, creating a safe space to openly discuss investments and challenges."

Yash Poddar

Co-principal & CIO, Vikas Poddar Family Office



“Aikya Connect is a highly focused community with a clear intent - supporting the unique needs of single family offices. Whether it’s investment strategies, succession planning, interpersonal dynamics, or constructing a family constitution, everything Aikya does revolves around the singular goal of empowering single family offices.”

Siddharth Mangharam

Principal, Mangharam Family Office



“The most special part of Aikya Connect is its community and peer network. It’s not just about having a network; it’s about the culture within it. What stands out is how candid and forthcoming everyone is. People are open to sharing their experiences and insights, without any sense of competition. This openness is what creates real value, making it an invaluable opportunity to learn and grow from the collective wisdom of the group.”

Chaitanya Kejriwal

Joint Managing Director, Parksons Packaging Ltd



“The best part about Aikya Connect is that it brings the entire investing ecosystem together in one place. It provides instantaneous validation from other family offices on various aspects of investing - be it products, geographies, or structures - making it incredibly valuable.

Another unique aspect of Aikya is the insights it offers into how family offices are organized. From understanding team structures and operational costs as a percentage of portfolios to exploring legal frameworks like trusts, estate planning, and succession, the forum has given us clear answers and helped us take definitive steps in these areas.”

Aanchal Singh

Head, Jayant Davar Family Office



Family Office Asset Allocation Trends 2025

In the backdrop of India's evolving investment landscape, this exclusive gathering offers a unique opportunity to navigate shifting dynamics, uncover emerging opportunities, and redefine strategies for wealth preservation and growth.

Designed for thought leaders from Family Offices, the forum fosters collaboration and equips CIOs / Principals with actionable insights to thrive in the ever-changing investment landscape.



9:00 am - 9:30 am

Registration & Welcome Breakfast

9:30 am - 9:50 am

Aikya Connect: Philosophy & Journey Thus Far

Jai Rupani,
Founder & Chairman,
Aikya Connect

Embark on the Aikya Connect Journey with our Founder.

9:50 am - 10:35 amIndia: The Next Decade of Growth: Opportunities
& Challenges**Keynote Presentation**

India stands at a pivotal juncture, riding the momentum of four years of explosive stock market returns. Yet, signs of an overheating economy and slowing demand growth are beginning to surface.

As investors, it's vital to decode where the next wave of opportunities lies and prepare for the challenges that may arise over the next decade.

Agenda

Friday, 11th April, 2025

10:35 am - 11:20 am

Chetan Mehta,
Founding Partner at
AUM Ventures

Pawan Chandana,
Co-Founder at
Skyroot Aerospace

Space: The New Frontier

With SpaceX valued at over \$350 billion and Indian startups making waves in the race to conquer space, the cosmos is no longer just a realm of exploration - it's the next frontier of investment.

The future is here - are you ready to launch?

Moderated by **Matthias Knab**, Managing Director & Managing Editor,
Opalesque (Journalist)

11:20 am - 11:50 am

Did anybody say coffee?

11:50 am - 1:15 pm

Thought Leadership
by Leading Asset Managers

Asset Class Roundtable Discussions

At Aikya Connect, our mission is to serve the evolving needs of single family office members. Through internal deliberation and member feedback, we identify investment themes that hold the greatest potential and relevance for future opportunities.

This roundtable discussion brings together renowned investment managers with deep expertise and domain knowledge in these carefully selected themes.



Deep-tech



Real Estate



Public Equity



Private Credit



Agenda

Friday, 11th April, 2025

1:15 pm - 2:30 pm

Lunch

2:30 pm - 2:50 pm

Market Sentiment Check
Live Poll on Asset-classes

2025: Top 10 insights on Asset Allocation from the room

Join us for an exhilarating live poll session the audience shares their asset class views anonymously-live! Amplify your voice and seize the opportunity to steer the course of future investments with real-time sentiment analysis!

2:50 pm - 3:30 pm

The Great Debate: Public vs Private

Public markets or private markets—which holds the key to unlocking greater opportunities and value? Join us for an engaging live debate featuring four passionate Aikya Connect members, each with strong and contrasting views on the merits of public and private investments.

3:30 pm - 3:55 pm

Keynote Presentation

Gold: Where do we go from here?

Gold has defied expectations, delivering over 35% returns in the past year, even amidst a strong dollar and historically high interest rates in the United States.



4:00 pm - 4:45 pm

Tea: Because it's too early for wine!

4:45 pm - 5:30 pm

Fireside Chat

Founder Fireside Chat

Inside the Journey of a Unicorn Founder.

Get ready for an unfiltered and inspiring fireside chat with a unicorn founder who has navigated the highs and lows of building a billion-dollar enterprise.

5:30 pm - 6:30 pm

Member-driven Roundtable Discussion

At Aikya Connect, peer-to-peer knowledge sharing is one of our founding pillars.

These exclusive roundtable discussions, led by our members, are designed to foster candid conversations and meaningful insights.

- How to Lose a Billion: Lessons from Missteps
- What's Hot: Where are you investing today?
- New-Age Asset Classes ~ Cars, Art, Wines and Whiskey
- Climate Change Investing

6:30 pm - 8:00 pm

Cocktail, Canapes and Live Jazz

8:00 pm - 10:00 pm

Gala Dinner

- End of Forum -





Heritage Excursion

Saturday, 12th April, 2025

11:00 am - 6:00 pm

Mumbai Cityscape Heritage Excursion

Embark on a captivating journey through the city's heart, offering a unique glimpse into its rich heritage and vibrant culture. This full-day excursion promises an unforgettable experience from 11 am to 6 pm.

We'll begin our adventure along a scenic route where the sea meets the bustling city. As we traverse through the area, you'll discover historic landmarks and hidden gems, each narrating a tale of the city's illustrious past. Witness the seamless blend of colonial architecture and modern skyscrapers, a testament to the city's dynamic spirit.

Our route will take us through charming neighborhoods and bustling markets, providing an authentic taste of local life.

Join us for an extraordinary journey that captures the city's essence, from its historic roots to its contemporary charm.

Spouses welcome to join!

Limited Seating Available: Spots will be allocated on a first-come, first-served basis.

Aikya Connect: Leadership



In life you only compete with yourself. The sooner you realise that, the better you become.

Jai is a Principal and the CIO of the Dinesh Hinduja Family Office. He oversees investments across all asset classes: public and private equity, derivatives, debt, structured products, venture capital and real estate. Jai is also in charge of the family office's strategic initiatives, which include the vision plan, next-gen mentoring, financial education, new venture creation, succession planning and philanthropy. He is very passionate about the family office ecosystem and about building world-class family offices.

Prior to the Family Office role, Jai has spent over 20 years in senior management roles across real estate development, private equity and investment banking across India and the USA. He has worked at RBC Capital Markets (San Francisco), True North Private Equity (Mumbai) and Gokaldas Group.

Jai is a firm believer in Karma. In his free time he enjoys spending time with his family, reading and watching movies. He has completed his formal education from the University of Michigan, Ann Arbor and the University of Texas at Austin in the USA.



Jai Rupani

Founder & Chairman, Aikya Connect
Head, Dinesh Hinduja Family Office



Past Events*

2024

- June | SFO Social Soiree, New Delhi, Crew Session - **Navigating Challenges Together**
- May | Family Office Mixer, **Opportunities in Climate Tech** with Priya Shah, Bangalore
- April | **3rd Annual Forum, Mumbai**
- February | Deep dive into **Sustainable Investing** by Stuart Hart, esteemed University of Michigan Faculty, Mumbai
- January | Investment Strategy & Expert Session on **Navigating Public Market Investments**, Hyderabad

2023

- November | Private Deal Room, Launch of **Single-Family Office Venture Capital Program**, Bangalore
- September | **International Forum, Dubai, Bringing the Middle-East & Indian SFOs together**
- August | Expert Call, **Decoding Valuations** by Aswath Damodaran, Professor at NYU Stern School of Business
- May | Private Deal Room, Gurgaon, Delhi NCR
- March | **2nd Annual Forum, Mumbai, What makes India tick?**
- February | Expert Call, **Discussion on US Equity Markets** by Gina Martin Adams, Chief Equity Strategist at Bloomberg, NYC

2022

- December | Special Purpose call, Bangalore, **Managing Offshore Investments through a Singapore VCC Structure**
- September | **International Forum, Singapore, Understanding Offshore Investments**
- August | Expert Call, **A Masterclass on Investing in Credit**
- July | Expert Call, **Weathering inflation based volatility - an economists lens** with Soumya Kanti Ghosh, Group Chief Economic Advisor, State Bank of India
- June | Investment Strategy Session, Mumbai
- May | Expert Call, **Geopolitics & Global Markets** with Marko Papic, Partner and Chief Strategist at Clocktower Group
- April | Special Purpose Call, **The art of fund manager evaluation and due diligence** with Ronen Schwartzman, Ten Capital Advisors, New York
- March | **1st AC Annual Domestic Forum, Mumbai**

2021

- November | Investment Strategy, **Public Markets: Where do we go from here?** with Nilesh Shah, Group President & Managing Director, Kotak Mahindra AMC
- July | Expert Call, **Gold - Is it time to shine again** with Ronald Stoferle, Managing Partner & Fund Manager, Incrementum AG
- April | **Launch of Aikya Connect**

*Select List, Not Comprehensive



The Investment Network For Single Family Offices

Should you wish to know more about
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Aikya Connect



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