



The 15th Annual One on One Conference 2019
Frontier Emerging Markets

NAVIGATING THE PATH TO OPPORTUNITIES

Under the patronage of
H.H. Sheikh Maktoum bin Mohammed bin Rashid Al Maktoum
Deputy Ruler of Dubai

3-6 March 2019 | Atlantis, The Palm | Dubai, UAE

Welcome to the 15th Annual One on One Conference

With developed economies witnessing consistent growth, central banks have changed tactic from quantitative easing and near-zero interest rates towards tighter monetary policies. A strengthening US dollar is proving increasingly attractive to investors seeking risk-adjusted returns, with demand and yields on US government bonds continuing to rise while emerging markets have witnessed the biggest capital outflows since the taper tantrum in 2013. Compounded by geopolitical tensions, an escalating trade war between the US and China and the restoration of sanctions on Iran, the shifting dynamics of 2019 are putting to question the resilience of key frontier emerging markets.

Will the structural growth drivers and strong fundamentals of FEMs see them withstand current headwinds and continue to present compelling investment opportunities? Or will EM capital outflows see the resurgence of an emerging markets' crisis? How does a strengthening US dollar affect fiscal and FX policy in FEMs with rising dollar-denominated debt? Will the effects of US-China trade tariffs ripple down to Southeast Asian markets that are part of Chinese value-added chains? Are the exceptions for eight countries importing Iranian oil sufficient to maintain price stability? How do price projections affect subsidy and deficit targets for countries like Egypt? Finally, what will Dubai's new FDI laws, EXPO 2020, and Abu Dhabi's newly unveiled stimulus mean for the UAE's and the wider region's economic performance in the coming years?

These questions and many more will be the key focus at the 15th Annual One on One Conference in Dubai, "Navigating the Path to Opportunities," – the world's largest annual forum dedicated to frontier emerging markets – where global investors will meet face-to-face with C-level executives to gain in-depth insight and explore key themes and on-the-ground strategies shaping investment decisions in 2019.

FEM Outlook

2019 is likely to be another challenging year for Emerging and Frontier Markets. While valuations are much improved after weak performance in 2018, the continuing rise in US interest rates will be a challenge for more heavily-indebted FEM markets. China's economy is an increasingly important engine for FEM growth, but recent stimulus measures are offering diminishing returns to scale. We see two strong themes for 2019: (1) Index upgrades and the impact of passive flows on Saudi Arabia and often-overlooked Kuwait and (2) ongoing recovery in markets that have already taken steps to rebalance their economies, such as Egypt and potentially Pakistan.



Venue: Dubai

The 15th Annual One on One Conference is being held at Atlantis, a luxury beachfront resort located on The Palm, Dubai's iconic man-made island in the United Arab Emirates (UAE)

Combining extravagant luxury and high-tech facilities with old-world charm, Dubai has fast become one of the world's most popular tourist destinations, renowned for its warm hospitality and iconic skyscrapers, opulent shopping centers, indoor theme parks and decadent culinary options.

In line with the government's decision to diversify from a trade-based, oil-reliant economy to one that is service and tourism-oriented, Dubai embarked on a period of

infrastructural development and expansion over the last few decades, owing to its emergence as a cosmopolitan metropolis that has grown steadily to become a business and cultural hub of the Middle East.

With its abundance of attractions, activities, exhibitions, shopping and nightlife, Dubai retained its ranking as the fourth most visited city in the world for the fourth year in a row, with nearly 15.8 million overnight visitors in 2017.

Agenda

Day 1

Sunday, March 3rd, 2019

| | |
|--------------------|-------------------------------------------------------------------------------------|
| 07:00-09:00 | Standing Breakfast and Registration* [Atlantis Ballroom Foyer, West Wing, Atlantis] |
| 09:00-11:00 | Main Session [Atlantis Ballroom, Atlantis] |
| 11:00-12:50 | One on One Meetings |
| 13:00-14:30 | Lunch [Saffron Restaurant, Atlantis] |
| 14:30-18:20 | One on One Meetings |

Day 2

Monday, March 4th, 2019

| | |
|--------------------|-----------------------------------------------------------------------|
| 07:00-19:00 | Registration & Scheduling [Meeting rooms floors, West Wing, Atlantis] |
| 08:00-11:00 | One on One Meetings |
| 12:00-13:20 | Lunch [Saffron Restaurant, Atlantis] |
| 13:30-18:20 | One on One Meetings |
| 20:30-23:30 | Gala Dinner [Venue TBC] |

Day 3

Tuesday, March 5th, 2019

| | |
|--------------------|-----------------------------------------------------------------------|
| 07:00-19:00 | Registration & Scheduling [Meeting rooms floors, West Wing, Atlantis] |
| 08:00-11:50 | One on One Meetings |
| 12:00-13:20 | Lunch [Saffron Restaurant, Atlantis] |
| 13:30-18:20 | One on One Meetings |

Day 4

Wednesday, March 6th, 2019

| | |
|--------------------|-----------------------------------------------------------------------|
| 07:00-19:00 | Registration & Scheduling [Meeting rooms floors, West Wing, Atlantis] |
| 08:30-11:50 | One on One Meetings |
| 12:00-13:20 | Lunch [Saffron Restaurant, Atlantis] |
| 13:30-18:20 | One on One Meetings |

** Above agenda is subject to change



Useful Information

Extended Format

Due to both the large number of companies scheduled to attend and the strong investor demand for meetings, we have decided to switch to a four-day conference format. Presenting companies will be scheduled to attend on either 3-4 March or 5-6 March 2019. Please indicate your preference in the registration form as to which two days you wish to attend so we can schedule your meetings accordingly.

Please visit your registration form to update your available time slots or contact oneonone@efg-hermes.com

Accommodation

Guests are kindly requested to book their own rooms at a special EFG Hermes conference rate at Atlantis, The Palm. A reservation link will appear in your registration confirmation email. If you would like to book a higher-level room, please contact the hotel directly.

More information about room types can be found at:
<https://oneonone2019.efghermes.com/pages/accommodation>

Additional Services

Atlantis, The Palm will be responsible for the below additional services throughout the conference. Kindly consult their website or contact them for questions regarding the following:

- Help obtaining visas
- Airport meet and greet service
- Arrangement of ground transportation
- Coordination of private aircraft logistics
- Arrangement of excursions

Visa

Visas to the UAE may be obtained through Emirate Airlines or Atlantis, The Palm. For terms and conditions for obtaining visas, contact the hotel directly.

Citizens of the GCC nations of Bahrain, Kuwait, Oman, Qatar and Saudi Arabia do not require a visa to travel to the UAE.



Useful Information CONTINUED >>

Session

Every investor presentation is slotted to run for 50 minutes. The following are the guidelines for these sessions:

- Each company should prepare a 30-minute presentation for investors.
- This should be followed by a 20-minute Q & A.
- There is a 10-minute preparation/break period after each 50-minute session.

Audio and Visual

Audio and visual requirements should be communicated to the One on One team via the form below, which needs to be filled out and submitted before 25 February 2019.

Meeting Room

A meeting room will be set up for the one on one meetings, which will be available to you throughout the conference. Group meetings, which give companies the opportunity to make presentations to investors from two or three companies, will also be held in these rooms.

Company Profile

In order to give an overview of your company's operations and financials to attending investors, a booklet containing your corporate information will be produced and made available to all attending investors, giving them an overview of your company operations and financials. This will be included in the delegate pack. The EFG Hermes Research team will be in contact with you to gather and communicate the information to be provided.

Presentation

Presentations will also be made available on the conference website, with access limited to registered investors. We thus request that you kindly send a print-resolution (not press resolution) PDF of your presentation to oneonone@efg-hermes.com before 25 February 2019.

Hard copies of your presentations can be sent to the conference venue beforehand via courier. Should you wish to do so, please highlight this on the Shipping Form below before 25 February 2019.

Promotional & Company Materials

To make best use of your networking time, please ensure that you bring a healthy supply of business cards. To further support delivery of your IR message, we would recommend that you make your company's annual report available in the meeting room for investors to take away with them as well as other investor-facing marketing materials you may feel appropriate.

Logo

Your company logo will be displayed on meeting room signs. We would appreciate receiving your high-resolution logo (in JPEG, PDF, Freehand or Adobe Illustrator format; at least 600 kb or 300 dpi resolution for non-vector files) to oneonone@efg-hermes.com before 31 February 2019.



Useful Information CONTINUED >>

Climate

The average temperature in Dubai in March is 26 Celsius (79 Fahrenheit), with highs of 29 Celsius (84 Fahrenheit) and lows of 23 (73 Fahrenheit) in the evenings. Precipitation is rare.

Time Zone

Dubai is four hours ahead of Greenwich Mean Time.

Dress Code

Formal business attire is appropriate throughout the conference. A light sweater or jacket may be appropriate in the evening when the weather is cooler.

Language

The official language of the meetings is English.

Contact Information

Email: oneonone@efg-hermes.com
 Website: <http://oneonone2019.efghermes.com>

Important Deadlines

| | |
|--------------------------------------------------------------|------------------|
| Registration | 29 January 2019 |
| Flight information | 29 January 2019 |
| High resolution logo (presenting companies) | 31 January 2019 |
| A/V Form | 25 February 2019 |
| Presentation (presenting companies) | 25 February 2019 |
| Shipping Form (presenting companies) | 25 February 2019 |



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Shipping Form

If you are sending any items for use during the event, we ask that you give us notice of the delivery to keep track of the status of your shipment. Please fill out the Shipping Form below and send it to oneonone@efg-hermes.com **before 25 February 2019.**

Company Name _____

Contact Name _____

Telephone _____

Date of Shipment _____

Number of Boxes _____

Transport Company _____

Airway Bill Number _____

Shipping Address _____

All packages should be marked "The 15th Annual One on One Conference, 3-6 March 2019," with your company name also clearly indicated and sent to:

Mr. Shams Attalla
c/o EFG Hermes - One on One Conference 2019
Associate Director of Events
Atlantis, The Palm
P.O. Box 211222
Crescent Road, The Palm Island
Dubai, UAE
Tel: (+971) 442 60366
Mobile: (+971) 566 035 660



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Audio and Visual Equipment Request Form

Please check the box next to equipment you require and return this form by email to oneonone@efg-hermes.com **before 25 February 2019.**

Available Audio and Visual Equipment

- Data Show (pull up screen and projector)
- 55" LCD
- Flip Chart

Requested By _____

Company Name _____

Contact Information _____

New Atlantis Experiences



Hakkasan

Now Open

This iconic restaurant is the latest addition to Atlantis, The Palm's list of award-winning restaurants. Modern authenticity is at the heart of everything at Hakkasan. Drink and dine in the restaurant and bar, segregated by intricate carved wooden screens and latticing that echo the rich and glamorous interiors of the London flagship restaurant. Dishes such as the Hakkasan Signature Pecking Duck and Jasmine Tea smoked Wagyu beef ribs are not to be missed.



Wavehouse

Now Open

Overlooking Aquaventure Waterpark, Wavehouse is an epic, multifaceted blend of rustic-beach-bar-meets-gastropub. Cleverly combining the best in dining and entertainment, this impressive, new-age social recreation destination merges hours of adventure, discovery and fun with live entertainment, fantastic food, creative beverages and hours of fun. Welcoming the Dubai tourist and residents alike, Wavehouse boasts a wealth of activity for all ages.



Imperial Club

Now Open

The Imperial Club lounge, which opened its doors in December 2018, is the perfect choice for guests seeking additional luxury, comfort and convenience. The new lounge is now exclusively welcoming Imperial Club and Suite guests to enjoy luxurious benefits during their stay.