PERE Investor Forum: Seoul
20 November 2019 | The Westin Chosun, Seoul

The PERE Investor Forum: Seoul is Asia’s leading outbound real estate investing event. Now in its sixth year, the Forum has a proven track-record of bringing together leading Asian investors with global fund managers – connecting capital with global private real estate investment opportunities. Join us to meet the most active Korean LPs in global real estate, discuss and debate the key trends driving outbound capital flows, and discover the most sought-after investment opportunities for next years across Asia, Australia, US and Europe as well as the latest strategies and most promising asset classes.

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- BlackRock
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- Global Hospitality Investment Group (GHIG)
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Tuesday 19 November 2019

1900 Opening Cocktails for LPs, Subscribers and Sponsors (by invitation only)

Wednesday 20 November 2019 – Global trends & global markets

0800 Registration and networking refreshments

0855 Welcome from the Chairperson

0900 Opening keynote panel: Latest trends in global real estate and capital flow - an LP and GP discussion
  - What are the latest capital flow movements and macro trends?
  - What attractive yields are out there for the Korean institutional?
  - Dynamic questions and answers round, driven by PERE’s editorial team

0945 Keynote GP address

1015 Networking and Coffee Break

1045 LP Panel
  - What are great strategies when it comes to portfolio diversification?
  - Capital owner perspectives and the recent co-investment rise
  - Exit strategies: often overlooked?

1130 Discussion: When is capital going to flood back into Asia?
  - Will current outbound trends continue or are we on the brink of capital flow change?
• What markets will profit most?
• What asset class promises highest yields in both developed and emerging Asia?

1200  Networking lunch

1330  All eyes on Europe – Where is room to grow?
- Korean investments of $8.4bn in income-producing assets and development sites abroad and three-quarters of this went to Europe, up from 59% in 2017. (RCA)
- What are opportunities in top-tier cities as London and Paris, as well as promising strategies in Central Europe?

1420  Hot topic: Alternatives within Alternatives
- Hospitality, storage, co-living, etc – What offers the best opportunities, from a yield, regional and demographic perspective?
- Changing demographic and generational purchasing behaviours
- Will the expertise come from established players?

Speakers:
Kevin Colket, Founder and CEO, Global Hospitality Investment Group (GHIG)

1500  Networking Break

1530  All quiet on the western front? – US opportunities now and in five years
- What are smart strategies to battle hedging costs and the late-cycle environment?
- What locations are worth keeping an eye on? And what classes will offer promising yields in the long run?

1615  Real estate debt – Latest strategies in a hot asset class
- What are the best RE debt strategies in Europe, Americas, Asia and Australia? And what are the opportunities with China deleveraging?
- What are the risks and returns across the capital stack?
- Who are the right partners to trust?

Speakers:
James Lim, CEO, CapitaLand Investment Management

1700  Closing LP Keynote

1730  Chairperson’s closing remarks followed by cocktail reception