

Infrastructure
Investor

Asia Summit Virtual Experience 2020

30 November-4 December
Virtual event UTC+8

Speakers Confirmed Include:

Jack Surtani, Director, Infrastructure Finance, **Asian Development Bank**
Thomas Walenta, Senior Investment Officer, **Asian Infrastructure Investment Bank**
Mujeeb Qazi, Head of Energy, Infrastructure Division, **ADIA**
Kishore Moorjani, Senior Managing Director, **Blackstone**
Ludovic Theau, Chief Investment Officer, **Clean Energy Finance Corporation**
Wilson Chung, Principal APAC, **Digital Colony**
Sajal Kishore, Head of Asia Pacific, Infrastructure & Project Finance Ratings Group, **Fitch Ratings**
James Fraser Smith, Head of Unlisted Infrastructure & Timberland, **Future Fund**
Ang Eng Seng, Chief Investment Officer, Infrastructure, **GIC**
Aditya Aggarwal, CEO, **Global Infrastructure Partners Singapore**
Vince Dizon, Cabinet Secretary, Presidential Adviser on Flagship Programs and Projects, **Government of the Philippines**
Guillermo Martínez-Navas, Head of Offshore Wind, Asia, **Green Investment Group**
Jordan Kraiton, Head of Infrastructure, **Hostplus**
Isabel Chatterton, Regional Industry Director, **IFC**
Seth Tan, Director, **Infrastructure Asia**
Luca Tonello, General Manager – Structured Finance Asia Pacific, **SMBC**

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Renewable Energy Forum

30th November 2020, Virtual Forum (times are based on HKT/UTC+8)

0800 **Tutorial Q&A (30 mins)**

0900 **PEI welcome and opening remarks followed by: Keynote Panel: Asia as the growth centre for renewables (55 mins)**

- How is the Asian renewables sector dealing with the Covid-19 crisis?
- What are the macroeconomic issues facing renewables as an investment sector?
- Asia as an investment destination compared to the US and Europe in 2020

Speakers: Tony Clamp, Director, Private Sector Facility, Green Climate Fund
Jack Surtani, Director, Infrastructure Finance, Asian Development Bank
Sajal Kishore, Head of APAC, Infrastructure & Project Finance Ratings Group, Fitch Ratings
Raymond Fung, Managing Partner, Albamen Capital Partners
Ang Eng Seng, Chief Investment Officer, Infrastructure, GIC

1000 **Keynote Presentation (30mins)**

Ludovic Theau, Chief Investment Officer, Clean Energy Finance Corporation

1035 **Interactive Roundtable (30mins)**

Autonomous Vehicles and new Transportation Solutions: Will They Have a Meaningful Impact on Infrastructure Planning and Investment?

Speaker: Nick Gibson, Founder & General Manager, Glydways Japan

1110 **Panel: Investing in Asian offshore wind (45mins)**

- Analysis of current deal pipeline and impact of project delays
- The current landscape of offshore wind in Japan
- Investment perspectives on the sector

Moderator: James McLaren, Partner, Linklaters



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Speakers: Shinichi Yasuda, Senior Vice President, Structured Finance Department, Development Bank of Japan

Guillermo Martínez-Navas, Head of Offshore Wind, Asia, Green Investment Group

Hans-Christoph Brumberg, Director, Business Development & Execution, APAC
wpd AG

1200 **Interactive Roundtable (30mins)**

Private Credit Investment Opportunities in Emerging Asia Renewable Energy

Speaker: Chris Botsford, CEO, ADM Capital

1230 **Break (120mins)**

1430 **Panel: Infratech and the energy in transition (45mins)**

- The impact of disruption and its implications for technology
- Improving efficiency and accelerating investments in innovation, e.g. carbon capture and storage
- Understanding the emergence of new technologies

Moderator: Isabelle Demir, Head of Real Assets, Frontier Advisors Pty Ltd

Speakers: Nick Gibson, Founder & General Manager, Glydways Japan

Matt Morgan, Managing Director, Infratech Growth Partners

Vishnu Amble, Global Strategic Investments, Corporate Ventures & Business
Development/Partnerships, Saudi Aramco

1520 **Interactive Roundtable (30mins)**

Chinese Renewables & Energy Storage

Speaker: Yuki Yu, Founder, Research Director, Energy Iceberg

1600 **Presentation: Green Hydrogen: what are the investment opportunities? (30mins)**

Speaker: Mendo, Kundevski, Principal & Loïc Rakotojaona, Manager ENEA
Consulting

1635 **Panel: Investing in solar (40mins)**

- State of the market: how has the crisis affected addition of solar capacity?
- In which areas in Asia is solar showing the most promise?
- Can India's solar market regain investor confidence?

Moderator: Jeffrey Altman, Senior Advisor, Finadvice

Speakers: Tony Nakamura, CEO, Canadian Solar Asset Management K.K.



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Scott Reinhart, Partner, Brawn Capital
Raghuram Natarajan, CEO, Asia Pacific, Mainstream Renewable Power
Rohit Nanda, SVP, Sumitomo Mitsui Banking Corporation

1720 **Speed Networking**

1750 **Close of Conference**

Investor Forum

1st December 2020, Virtual Summit (times are based on HKT/UTC+8)

0800 **Website user Q&A (30mins)**

0900 **PEI welcome remarks & Keynote Panel: Investing in Asia in the time of Covid-19 (50mins)**

- The current state of Asian economies and their impact on infrastructure growth
- Assessing the impact – which sectors have been hit the hardest?
- What is the new normal for infrastructure in Asia?

Moderator: Adam Cotter, Director & Head of Asia, OMFIF

Speakers: Isabel Chatterton, Regional Industry Director, IFC

Seth Tan, Director, Infrastructure Asia

Aditya Aggarwal, CEO, Global Infrastructure Partners Singapore

Luca Tonello, General Manager, Structured Finance Asia Pacific at Sumitomo Mitsui Banking Corporation

0955 **Presentation: The impact of Covid 19 on unlisted infrastructure equity returns in Asia Pacific - Q3 2020 update (30mins)**

Speaker: Frederic Blanc Brude, Director, EDHEC Infrastructure Institute Singapore

1030 **Interactive Roundtable (30mins)**

Indian Infrastructure

Speaker: Chandra Reddy, Advisor to Corporate Chairman, GMR Infrastructure

1105 **Keynote Case Study: The impact of Covid-19 on airports and transportation – implications for investors (30mins)**

Speaker: James Fraser Smith, Head of Unlisted Infrastructure & Timberland, Future Fund



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1140 **Panel: Meet the GPs – how do they assess their portfolios and the current market? (50mins)**

- Amid the crisis, in what sectors hold value? What are the opportunities in distressed assets?
- How have GPs adjusted to the 'new normal'? How has this affected their investment strategies and operations?
- How do GPs evaluate the current fundraising environment?

Moderator: Daniel Kemp, Superfunds Correspondent, Infrastructure Investor

Speakers: Jamie Storrow, Managing Director, Northleaf Capital Partners
Prasad Gadkari, Executive Director & Chief Strategy Officer at National Investment & Infrastructure Fund (NIIF)

Ross Israel, Head of Global Infrastructure, QIC

1230 **Break (115mins)**

1425 **Interactive Roundtable (30mins)**

ASEAN Infrastructure

Speaker: Seth Tan, Director, Infrastructure Asia

1500 **Panel: New growth opportunities in infrastructure and the rise of digital (50 mins)**

- New areas of infrastructure investing - digital infra, data centres etc.
- The impact of 5G in spurring the digital revolution
- Are they recession proof? What are the growth opportunities?

Moderator: Peter Hobbs, Managing Director, bfinance

Speakers: Kishore Moorjani, Senior Managing Director, Blackstone
Wilson Chung, Principal APAC, Digital Colony

Masoud Hodayoun, Partner, EQT

Harsh Agrawal, Partner, I Squared Capital

LN Sadani, Founder & CEO, Lensbridge Capital

1555 **Panel: Implementing successful investment strategies for Emerging Asian markets (45mins)**

- Where are the attractive markets and sectors for emerging markets in Asia?



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- The renewable energy sector in ASEAN – a strong rebound?
- Which sectors are seeing a drive in PPPs?

Moderator: Andrew Kinloch, Managing Director, Logie Group

Speakers: Neil Brown, Partner, Actis

Mujeeb Qazi, Head of Energy, Infrastructure Division, ADIA

Vince Dizon, Cabinet Secretary, Presidential Adviser on Flagship Programs and Projects, Government of the Philippines

Allard Nooy, CEO, InfraCo Asia

1645 **Interactive Roundtable (30mins)**

Digital Infrastructure

Speaker: Raymond Fung, Managing Partner, Albamen Capital Partners

1720 **Interview: An introduction to the UK regulatory system for Asian investors (30mins)**

- Examining the role of regulators and the evolution of relationships with industry
- How does the system of price controls balance investor and consumer interests and underpin reliable investment in UK infrastructure?
- Future challenges: infrastructure investment in context of Net Zero and the Covid-19 recovery

Interviewee: Rachel Fletcher, CEO, Ofwat & UK Regulators Network & William Godfrey, Economics Director, Ofcom

Interviewer: Zak Bentley, Senior Reporter, Infrastructure Investor

1755 **Speed Networking**

1825 **Close of Day One**

2nd December 2020, Virtual Summit (times are based on HKT/UTC+8)

0900 **PEI opening remarks followed by Panel: Understanding the APAC LP – portfolio allocations & investment strategy (50mins)**

- How have APAC LPs been revaluating their portfolios?
- Where are they increasing/decreasing their allocations? In which areas have they been hit?
- How have LPs been dealing with travel constraints and challenges of executing due diligence?



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Moderator: Lidia Medojevic, Associate Director, Real Assets, Willis Towers Watson

Speakers: Thomas Walenta, Senior Investment Officer, Asian Infrastructure
Investment Bank

Takahiro Kato, Executive Director, Head of International Fund Investment, DBJ Asset
Management

Jordan Kraiten, Head of Infrastructure, Hostplus

Henry Lui, Senior Vice President, Sumitomo Mitsui Trust Bank

1000 **Interactive Roundtables (30mins)**

LP Roundtable (LPs only)

Speaker: Lidia Medojevic, Associate Director, Real Assets, Willis Towers Watson

1035 **Developing Infrastructure as a sustainable asset class (45mins)**

- Does all infrastructure need to be sustainable post Covid-19?
- Creating long term sustainable infrastructure portfolios for investors
- Preparing portfolios for the climate change challenge

Moderator: Joanne Lee, CFA, Specialist, Finance Practice, WWF International

Speakers: Xinying Tok, Director, Asia Research & Engagement (ARE)

Alexandra Tracy, Managing Director & Founder, Hoi Ping Ventures

Dennis Chan, Head of Infrastructure, Managing Director, China Ping An Insurance
Overseas (Holdings) Limited

1125 **Interactive Roundtable (30mins)**

Session: Speed networking

3rd December 2020, Virtual Summit (times are based on HKT/UTC+8)

1400 **Interactive Roundtable: Australian Infrastructure (30mins)**

Speaker: Dania Zinurova, Portfolio Manager, Wilson Asset Management

4th December 2020, Virtual Summit (times are based on HKT/UTC+8)

1400 **Interactive Roundtable: Women in Infrastructure (60mins)**

Speakers: Joanne Spillane, Global Head of Private Capital Markets Macquarie Group,

Gwen Collin, Head of Sustainable Finance, ENEA Consulting, Joanne Lee, CFA, Specialist,
Finance Practice, WWF International, Isabelle Demir, Head of Real Assets, Frontier Advisors
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