

PERE

Investor Forum Tokyo 2019

PERE Investor Forum: Tokyo

17 October 2019 | Tokyo

Wednesday 16 October 2019

19:00 **VIP dinner & cocktail** for sponsors and investors (by invitation only, TBC)

Thursday 17 October 2019 – Venue: Shangri La Hotel, Tokyo

08:30 **Registration and networking**

08:50 **PERE welcome**

09:00 **Keynote Panel: International GPs views on the latest global real estate trends**

- Where do GPs currently recommend investing their money globally? In what sectors and geographies?
- do they consider current geopolitical risks when making investing decisions?
- How are investors shifting their investment strategies and portfolios in light of global market trends?

09:50 **Keynote Presentation**

10:20 **Keynote Interview: Starting a direct investment strategy – lessons learnt from a major investor**

10:50 **Networking coffee break**

11:15 **Panel: The Japanese Investment Opportunity**

- As prices continue to rise, when will they peak?
- As it becomes harder to find returns, where do you find the best value?

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- Do core investing strategies still work in Japan? Identifying and addressing performance inhibitors
- Best practices in both the pre-deal and post-deal selection processes

12:05 **Panel: Spotlight on North American Real Estate**

- Does the US still deserve to be the No.1 outbound market for Japanese investors?
- Outlook for office, retail, residential and industrial sectors
- What are the best strategies in order to manage and mitigate risk in US markets?

12:50 **Networking lunch**

13:50 **Panel: Real estate debt: what can it offer that equity can't?**

- What are the advantages of investing in debt at this stage of the cycle? What are the risks?
- What are the different types of debt strategies best suited for Japanese investors?
- How does currency play into debt strategies?

14:35 **Panel: Japan success stories: Investing in hotel and hospitality sectors**

- Japan – the best hotel investment opportunity in the world or an overheated market?
- What are the niche area value plays in the sector?
- Can you make money in 5 star hotels in Japan?

15:10 **Networking coffee break**

15:40 **Presentation: Japan Macro-Economic Overview**

16:10 **Panel: The growing role of ESG in the investment process**

- Assessing the impact of the fourth industrial revolution on private equity
- Gauging the disruptive effects of machine learning, the connected world and infrastructure trends

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- Discovering and applying solutions to the impact of disruptive elements on business models

16:50 **Panel: Japanese LPs report card – how do they assess their current investments so far?**

- How do Japanese investors evaluate their real estate portfolios so far? Is optimism or caution increasing in the late cycle?
- Where are they looking for opportunities globally? Are they looking to increase or decrease their outbound exposure?
- How do they build and monitor their portfolio? What is their due diligence process?

17:30 **Close of conference & cocktail reception**

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