

PERE

Investor Forum Tokyo 2019

PERE Investor Forum: Tokyo

17 October 2019 | Shangri-La Hotel, Tokyo

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Investor Forum
Tokyo 2019

Speakers Confirmed Include:

Hidetoshi Ono, Head of Direct Real Estate, Aberdeen Standard Investments

James Haines, General Manager, Aozora Bank

Sarah Cooper, Managing Director, Global Head, RE Equity Sales, Bank of America
Merrill Lynch

Daisuke Kitta, Senior Managing Director, Head of Japan, Blackstone

Adrian Harrington, Head of Capital and Product Development, Charter Hall

Tetsuya Fujita, Managing Director, Country Manager- Japan, CBRE Global
Investors

Avi Shemesh, Co-Founder and Principal, CIM

Chris Allman, Managing Director, Capital Markets, CIM

Bob McClain, Head of RE Investment Strategies, Crow Holdings Capital

Tim Bowder Ridger, CEO, Senior Partner, Conrad & Partners

Ryuichi Horie, CEO & Co Founder, CSR Design Green Investment Advisory Co Ltd

Shuichi Masunaga, Director, Development Bank of Japan

Mark W. Elliott, President, Hodges Ward Elliott

Koji Ohashi, Chief Investment Officer, Fuji Xerox Pension Fund

Kevin Colket, Founder & CEO, Global Hospitality Investment Group

Yoshito Nishikawa, Managing Officer, Hulic

Hans Heijligers, Head of Japan, IHG, CEO, IHG ANA Hotels Group Japan

Dr. Leonard Meyer zu Brickwedde, President & CEO, Kenzo Capital Corporation

Kiyosei Sugioka, Head of Alternative Investments, ORIX Life Insurance Corporation

Seth Sulkin, President & CEO, Pacifica Capital KK

Shigeru Yagi, Director of Real Estate Investment, Pension Fund Association

Matthew Strotton, Director, Capital, Global Real Estate, QIC

Mitsuhiro Arakawa, Executive Consultant, Russell Investments Japan

Shinji Kawano, Head of Overseas Property Investment, Tokio Marine Asset
Management

Toyohiko Kishida, Head of Hospitality Finance Dept, Tokyo Star Bank

Robert Fordi, CEO & Managing Partner, Realterm Logistics

Yutaro Tanaka, President & CEO, Tokyu Land Capital Management Inc.



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Wednesday 16 October 2019

19:00 **VIP cocktail** for sponsors and investors (by invitation only)

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?
- How 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?

Moderator: Sarah Cooper, Managing Director, Global Head, RE Equity Sales, Bank of America Merrill Lynch

Speakers: Adrian Harrington, Head of Capital & Product Development, Charter Hall
Matthew Strotton, Director, Capital, Global Real Estate, QIC

09:50 **Presentation & Fireside Chat**

Speakers: Mark W. Elliott, President, Hodges Ward Elliott & Christie Ou, Reporter, PERE

10:20 **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?
- Do core investing strategies still work in Japan?
- Best practices in both the pre-deal and post-deal selection processes

Speakers: Hidetoshi Ono, Head of Direct Real Estate, Aberdeen Standard Investments

Daisuke Kitta, Senior Managing Director, Head of Japan, Blackstone

Yoshito Nishikawa, Managing Officer, Hulic

Dr. Leonard Meyer zu Brickwedde, President & CEO, Kenzo Capital Corporation



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11:05 **Networking coffee break**

11:35 **Presentation: People, Context and Reinvention - a layered approach to creating a sense of place**

Speaker: Tim Bowder Ridger, CEO, Senior Partner, Conrad & Partners

12:00 **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?

Speakers: Avi Shemesh, Co-Founder and Principal, CIM

12:45 **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?

Speakers: Speaker TBC, Blackrock

James Haines, General Manager, Aozora Bank

Chris Allman, Managing Director, Capital Markets, CIM

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

- What are the opportunities to make attractive returns when investing in hotels in Japan?
- With huge increases in new supply, will it outpace demand?
- How to make money in 4 and 5 star hotels with world's highest expectation for service and lifetime employment.

Moderator: Kevin Colket, Founder & CEO, Global Hospitality Investment Group

Speakers: Seth Sulkin, President & CEO, Pacifica Capital KK

Hans Heijligers, Head of Japan, IHG, CEO, IHG ANA Hotels Group Japan

Toyohiko Kishida, Head of Hospitality Finance Dept, Tokyo Star Bank



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15:10 **Networking coffee break**

15:30 **Panel: Real estate specialist strategies**

- How can investors best capitalize on the logistics boom?
- Overview of sectors such as healthcare, multifamily and student housing
- Where do data centres fit within the real estate portfolio?

Speakers: Bob McClain, Head of RE Investment Strategies, Crow Holdings Capital
Robert Fordi, CEO & Managing Partner, Realterm Logistics

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

- How important is the role ESG to Japanese investors in their investment process?
- To what extent are GPs successfully addressing ESG concerns?
- ESG as a value driver in real estate

Moderator: Tetsuya Fujita, Managing Director, Country Manager- Japan, CBRE Global Investors

Speakers: Ryuichi Horie, CEO & Co Founder, CSR Design Green Investment Advisory

Shuichi Masunaga, Director, Development Bank of Japan

Yutaro Tanaka, President & CEO, Tokyu Land Capital Management Inc.

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?

Moderator: Mitsuhiro Arakawa, Executive Consultant, Russell Investments Japan

Speakers: Koji Ohashi, Manager, Fuji Xerox Co.,Ltd

Shigeru Yagi, Director of Real Estate Investment, Pension Fund Association

Kiyosei Sugioka, Head of Alternative Investments, ORIX Life Insurance Corporation

Shinji Kawano, Head of Overseas Property Investment, Tokio Marine Asset Management

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



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