

PERE

Investor Forum Tokyo 2019

PERE Investor Forum: Tokyo

17 October 2019 | Shangri-La Hotel, Tokyo

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Investor Forum

Tokyo 2019

Wednesday 16 October 2019

19:00 **VIP 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?
- 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?

09:50 **Keynote Interview: Starting a direct investment strategy – lessons learnt from a major investor**

10:20 **Presentation & Fireside Chat**

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?
- Do core investing strategies still work in Japan?
- 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?



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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**

- 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.

15:10 **Networking coffee break**

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

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

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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