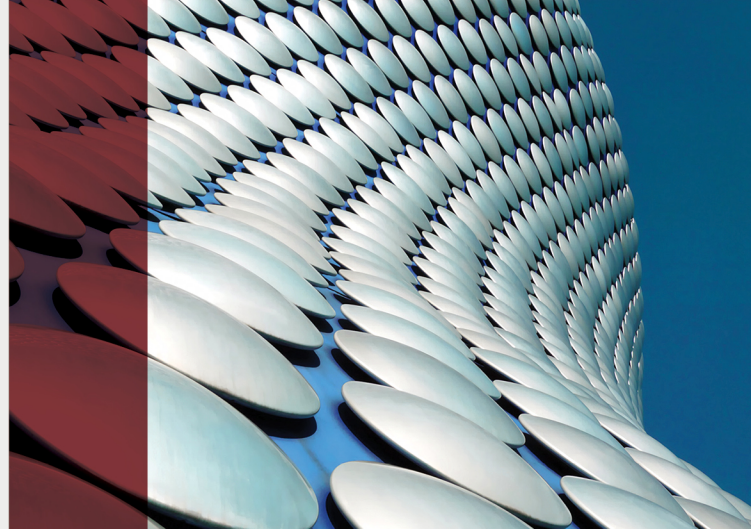


PERE

# Investor Forum: Tokyo

Virtual experience 2020

17 September  
Virtual event JST/UTC+9



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### Confirmed Speakers Include:

- Laurent Jacquemin, Head of Asia-Pacific, **AXA Investment Managers Real Assets**  
Mitsuhiro Arakawa, Executive Consultant, **Russell Investments**  
Kevin Colket, Founder & Chief Executive Officer, **Global Hospitality Investment Group**  
Tetsuya Fujita, President, **CBRE Global Investors Japan**  
James Haines, General Manager, **Aozora Bank**  
Akihisa Hoshino, Deputy General Manager, Investment Management Department,  
**Sumitomo Mitsui Trust Bank**  
Tokokazu Imazeki, Chief Analyst, **Sanko Estate**  
Takeshi Ito, Senior Investment Officer & Chief Operation Officer, **AISIN Employees'**  
**Pension Fund**  
Shinji Kawano, Head of Overseas Property Investment, **Tokio Marine Asset Management**  
Harumi Kadono, Head of Fund Management Department and Managing Director, **IDERA**  
Daisuke Kitta, Senior Managing Director, Head of Japan, **Blackstone**  
Martin Schulz, Chief Policy Economist, **Fujitsu**  
Naoko Saito, Senior Vice President, **ProLogis**  
Kiyosuke Sugioka, Head of Alternative Investments, **Orix Life Insurance**  
Midori Suzuki-Tsushima, Executive Manager, **Tosei Asset Advisors**  
Shusaku Watanabe, Director of Capital Transactions, Real Estate, Asia Pacific, **Nuveen**  
**Real Estate**

Monday 14 September 2020 – Virtual Networking Opens (As part of PERE Japan Korea Week)

Thursday 17 September 2020 – Venue: Virtual platform (All times are based on Tokyo Time)

08:50 **PERE welcome**

09:05 **Keynote Panel: Putting Japanese capital to work in global markets**

How can Japanese investors get more comfortable about actively participating in the global real estate markets given the current crisis?

Investing in EU vs. UK in the post Brexit world

The US: is it one market or many? How should Japanese investors look at it in the current context?



For programme information:  
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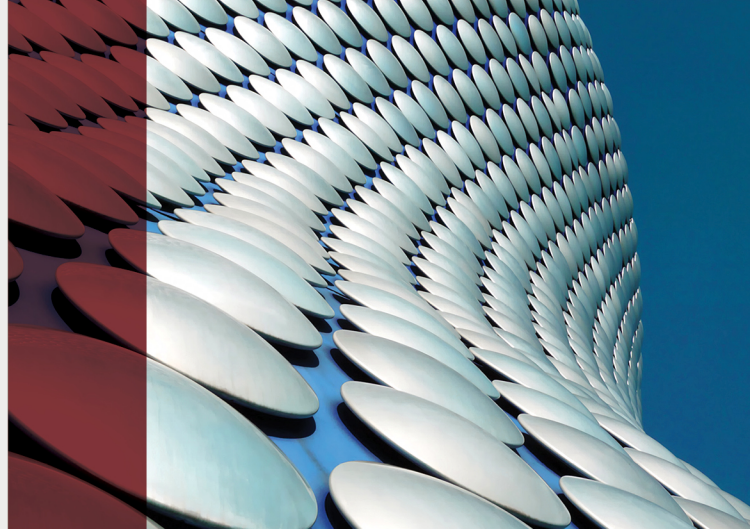
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Moderator: Arshiya Khullar, Editor, *PERE*

09:50 **Keynote Presentation**

10:20 **Panel: Real Estate opportunities beyond core sectors**

Understanding mid-market investing opportunities

Value add and Opportunistic funds, should Japanese investors be taking a closer look?

How has the current crisis impacted these sectors?

**Moderator:** Christie Ou, Reporter, *PERE*

**Speakers:** Laurent Jacquemin, Head of Asia-Pacific, AXA IM Real Assets  
Shusaku Watanabe, Director of Capital Transactions, Real Estate, Asia Pacific,  
Nuveen Real Estate

11:05 **Birds of a feather**

“Birds of a feather” is the virtual equivalent of a breakout or roundtable at a traditional conference, you will be face-to-face with likeminded peers and a specialist moderator to push forward the asset class.

**Session 1:**  
**Risk Management and  
Covid-19**

**Session 2:**  
**Emerging real estate  
growth sectors**

**Session 3:**  
**Co-investing**

11:35 **Presentation: Post-Covid: Who is ready for the new normal?**

**Speaker:** Martin Schulz, Chief Policy Economist, **Fujitsu**

12:05 **Panel: Current investing trends in the Japanese market**

Japan in post-covid – What are the most important themes for investors?

How has the coronavirus impacted the market?

Why are investors increasingly interested in the residential sector?

**Moderator:** Tetsuya Fujita, President, CBRE Global Investors Japan

**Speakers:** Harumi Kadono, Head of Fund Management Department and Managing Director, IDERA

Daisuke Kitta, Senior Managing Director, Head of Japan, Blackstone  
Midori Suzuki-Tsushima, Executive Manager, Tosei Asset Advisors



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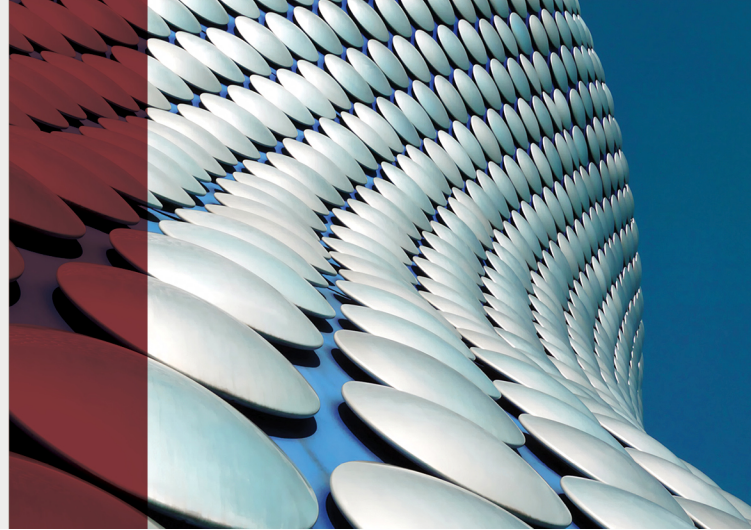
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**Session 1:**  
**US Real Estate**

**Session 2:**  
**European Real Estate**

**Session 3:**  
**Asian Real Estate**

13:50 **Panel: Real estate debt – a winning sector in times of uncertainty?**

Debt vs Equity – for the Japanese investor, what is best now and why?  
Debt opportunities – USA vs EUR vs Japan vs elsewhere such as Australia  
Senior vs. Mezzanine – for the Japanese investor, what are the pros and cons?

**Moderator: Ari Druker**

**Speakers:** James Haines, General Manager, Aozora Bank  
Shai Greenberg, Senior Vice President, Genkai Capital Management

14:30 **Panel: Integrated resorts, hospitality and the impact of Covid-19**

Assessing the impact of Covid-19 in Japan on the industry  
Perspectives and lessons learned from international and domestic investors  
Distressed opportunities for investing in the sector

15:10 **Birds of a feather**

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**Session 1:**  
**Proptech**

**Session 2:**  
**Tokyo Real Estate**

**Session 3:**  
**Exit Strategies**

15:30 **Panel: Investing in sector specific vs diversified funds**

Understanding the pros and cons to investing sector specific vs diversified funds  
Japanese LPs have shied away from sector specific funds, why should they reconsider them?

Overview of sector specific investing opportunities such as in residential and logistics

**Moderator:** Charles Haase, Managing Director, Client Relationship Management, Aetos Japan



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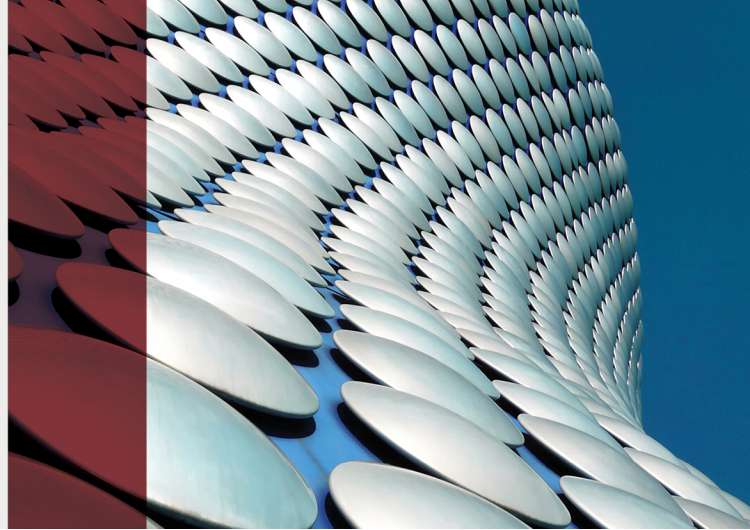
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**Speakers:** Naoko Saito, Senior Vice President, **ProLogis**  
Barry Hirschfeld, President & CEO, **Asia Investment Partners**  
Matt Dimond, Managing Director, **Mayfair Capital Investment Management**

16:10 **Presentation: Overview of the Japanese Office Market**

**Speaker:** Tokokazu Imazeki, Ph.D., Chief Analyst, Sanko Estate

16:40 **Panel: What do Japanese LPs want? The secrets to relationship building in Japan**

How do more experienced LPs evaluate their RE portfolio of investments so far?  
What is preventing other LPs from deploying into the market?

LP Scorecard: How do LPs assess their current relationships with GPs so far?

**Moderator:** Mitsuhiro Arakawa, Executive Consultant, Russell Investments

**Speakers:** Akihisa Hoshino, Deputy General Manager, Investment Management Department, Sumitomo Mitsui Trust Bank

Takeshi Ito, Senior Investment Officer & Chief Operation Officer, AISIN Employees' Pension Fund

Kiyosuke Sugioka, Head of Alternative Investments, Orix Life Insurance

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

17:40 **Birds of a feather**

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**Session 1: LP Lounge**

**Session 2:**

**Session 3:**

**Session 4:**

**Session 5:**

**Session 6:**

18:10 **Close of conference**

**Virtual Networking available until 18<sup>th</sup> September JST**



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