

PERE

Asia Week

Virtual experience 2020



PERE ASIA WEEK

16-20 November 2020 | Virtual event UTC+8

PERE Asia Week is the premier annual meeting place for global real estate's institutional investors, fund managers and asset managers, developers, advisors, and strategic partners to make decisions that define the asset class.

This year's **PERE Asia Week** will be running as an immersive virtual experience opening with a day focused on fundraising for real estate debt strategies, the **PERE Debt Forum on 16 November**, followed by the 13th annual **PERE Asia Summit on 17-18 November**. Your experience is no longer confined to a couple of days, with expanded 5-day video networking and connectivity with the community until the end of February 2021.

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Private Debt
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PERE DEBT FORUM

16 November 2020 | Virtual event SST / UTC+8

The only exclusively debt-focused real estate event in Asia, the 2nd annual **PERE Debt Forum** will once again open **PERE Asia Week** on 16 November 2020. For the very first time, the entire week will be available virtually to ensure the asset class' most influential conference can meet to address industry challenges and light a path forward.

The Debt Forum is your best opportunity to build your network of credit-focused real estate investors. Our immersive virtual conference will give you greater access than ever before, with increased visibility, extended 5-day online networking on 16-20 November 2020 and premium content available until February of 2021.

Featured Speakers and Organisations

- Chairperson: Bill Schwab, CEO, **LCI Investment Company** and former Global Head of Real Estate, **Abu Dhabi Investment Authority**
- Jinglei Chen, Managing Director, **BEI Capital Partners**
- Grant Chien, Head of Special Situations Financing, **InfraRed NF Investment Advisers**
- Yulanda Chung, Head of Sustainability, **DBS**
- Kevin Colket, Founder and CEO, **GHIG**
- James Dilley, Partner, **PwC**
- Jiroo Eoh, Team Head, **ABL Life Insurance**
- James Haines, General Manager and Head of Global Real Estate Structured Debt, **Aozora Bank**
- Mark Harrison, Managing Director – Property, **Wingate**
- Jason Howes, Fund Manager, **Dexus Real Estate Partnership**
- Dong Hun Jang, Chief Investment Officer, **Public Officials Benefit Association (POBA)**
- Hannah Jeong, Head of Valuation & Advisory Services, **Colliers International**
- Rai Katimansah, Partner and Portfolio Manager, **Multiple Capital Investment Partners**
- Jonathan Lau, Investment Director, **Pacific Tiger Group**
- Evelyn Lee, Editor, **PERE**
- Varun Malik, Head of Real Estate Client Coverage, APAC, **Morgan Stanley Capital International (MSCI)**
- Benjamin McCarron, Lead Representative for Asia, **GRESB**



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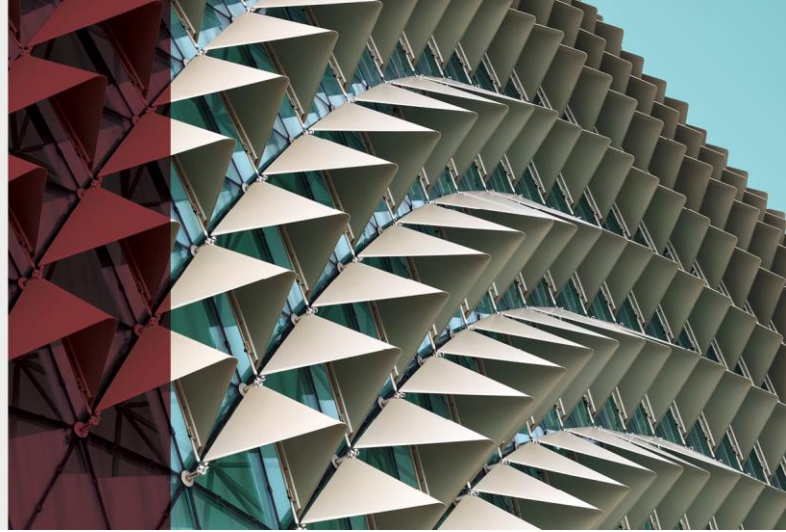
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- Lennart van Mierlo, Head of Commercial Real Estate Debt, **NN Investment Partners**
- Laurenziello Nunzio, Head of Debt Investments, **Generali Real Estate**
- Christie Ou, Reporter, **PERE**
- Catriona Paterson, Director, **Paterson Sustainability**
- Andrew Radkiewicz, Global Head of Private Debt Strategy and Investor Solutions, **PGIM Real Estate**
- Matt Salem, Partner and Head of Real Estate Credit, **KKR**
- Duncan Scorey, Director, Private Capital & Fixed Income, **Capital Generation Partners**
- Mervyn Tang, Senior Director, Global Head of ESG Research, **Fitch Ratings**
- Leslie Vargas, Vice President, Private Debt, **Swiss Re**
- Peter Weidman, Global Head of Credit Investing for the Real Estate Group, Merchant Banking Division, **Goldman Sachs**
- Trent Winduss, Head of Asia Secured Debt Investments and Head of Australian Investments, **Phoenix Property Investors**
- Helena Wright, Vice President - Sustainable Infrastructure & Energy Finance, **WWF**
- Eddie Yeh, Asia Head of Real Estate Financing, **Sumitomo Mitsui Banking Corporation**

6.00	Platform opens for private meetings
9.00	PERE virtual conference tutorial and Welcome from PERE A quick yet comprehensive walkthrough on how to make most out of your virtual pass
9.05	Opening remarks from the Chairperson Speaker: Bill Schwab , CEO, LCI Investment Company and former Global Head of Real Estate, Abu Dhabi Investment Authority
9.15 – 9.55	Keynote Panel: Mapping out real estate debt in today's investment environment <ul style="list-style-type: none">• What are the key learnings and return expectations from the covid-19?• Latest trends in global real estate and how debt fits into the modern portfolio• The benefits and nuances of private equity real estate versus debt Moderator: Bill Schwab, CEO, LCI Investment Company and former Global Head of Real Estate, Abu Dhabi Investment Authority Speakers: Matt Salem, Partner and Head of Real Estate Credit, KKR Leslie Vargas, Vice President, Private Debt, Swiss Re



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	<p>Peter Weidman, Global Head of Credit Investing for the Real Estate Group, Merchant Banking Division, Goldman Sachs</p>
10.00 – 10.40	<p>Panel: Is now the right time to invest in real estate debt in Australia?</p> <ul style="list-style-type: none">• How real estate debt has been impacted by pandemic in Australia?• Pinpointing the best opportunities in this preferred, but very competitive, market• Where are we in the economic cycle and how does credit special situations change in response to the wider economic situation <p>Moderator: Christie Ou, Reporter, PERE Speakers: Mark Harrison, Managing Director – Property, Wingate Jason Howes, Fund Manager, Dexus Real Estate Partnership Trent Winduss, Head of Asia Secured Debt Investments and Head of Australian Investments, Phoenix Property Investors</p>
10.45 – 11.05	<p>Networking break with 1-2-1 Meetings</p>
11.10 – 11.50	<p>Panel: How LPs takes a view on the next decade for real estate debt</p> <ul style="list-style-type: none">• What impact has the pandemic had on investor portfolio exposure on real estate debt? Where are the next target markets in the post-pandemic world?• Do investors put real estate debt in alternatives or a real assets bucket? What are the pros and cons to each allocation tactic?• Will there be a growing appetite beyond private debt or infrastructure debt? <p>Moderator: Tomoko Kitao, Managing Director - Japan Representative, Hamilton Lane Speakers: Jiroo Eoh, Team Head, ABL Life Insurance Jonathan Lau, Investment Director, Pacific Tiger Group</p>
11.55 - 12.35	<p>Panel: What will the Asian real estate debt landscape look like after pandemic?</p> <ul style="list-style-type: none">• What are the best real estate debt strategies in China, Hong Kong and the rest of Asia?



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	<ul style="list-style-type: none">• What should lenders aware, how do they monitor their credit portfolios and what actions can they take to minimise risk?• On the long-term view, which sectors best suited for Asian investors once the volatility settles? <p>Moderator: James Dilley, Partner, PwC</p> <p>Speakers:</p> <p>Jinglei Chen, Managing Director, BEI Capital Partners</p> <p>Grant Chien, Head of Special Situations Financing, InfraRed NF Investment Advisers</p> <p>Eddie Yeh, Asia Head of Real Estate Financing, Sumitomo Mitsui Banking Corporation</p>
12.40 – 14.00	<i>Lunch Break</i>
14.00 – 14.40	<p>Panel: ESG: avoiding risk, seeking opportunity</p> <ul style="list-style-type: none">• How has the pandemic affected real estate lenders' focus on ESG risks and opportunities?• What is the potential for green finance in real estate?• What are the barriers to realising these opportunities?• What should debt investors ask for to pursue long term sustainable investment in Asia? <ul style="list-style-type: none">• How the covid-19 crisis has affected real estate lenders' focus on ESG risks and opportunities?• To pursue long term sustainable investment, what should LPs seek the most from GPs?• What have we learnt from global ESG strategies and what GPs should apply in their policies and practices?• How lenders can make a positive environmental impact in 2021? <p>Moderator: Benjamin McCarron, Lead Representative for Asia, GRESB</p> <p>Speakers:</p> <p>Yulanda Chung, Head of Sustainability, DBS</p> <p>Catriona Paterson, Director, Paterson Sustainability</p> <p>Mervyn Tang, Senior Director, Global Head of ESG Research, Fitch Ratings</p>



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	Helena Wright, Vice President - Sustainable Infrastructure & Energy Finance, WWF
14.45 – 15.25	Panel: Bank vs Debt fund manager: Lender perspectives <ul style="list-style-type: none">• How do you expect the profile of borrowers and lenders to change in 2021?• What are smart ways to battle hedging costs?• How to pursue different debt strategies for high yield Moderator: Varun Malik, Head of Real Estate Client Coverage, APAC, Morgan Stanley Capital International (MSCI) Speakers: James Haines, General Manager and Head of Global Real Estate Structured Debt, Aozora Bank Rai Katimansah, Partner and Portfolio Manager, Multiple Capital Investment Partners Lennart van Mierlo, Head of Commercial Real Estate Debt, NN Investment Partners
15.30 - 15.50	Networking break with 1-2-1 Meetings
15.55 – 16.35	Panel: Real estate debt risks or opportunities in Europe <ul style="list-style-type: none">• How the pandemic, Brexit, trade tensions, and interest rate risk impact investment?• Opportunities across the risk reward spectrum in European real estate debt for Asian investors• Current availability of debt and financing for core and non-core assets Moderator: Evelyn Lee, Editor, PERE Speakers: Kevin Colket, Founder and CEO, GHIG Laurenziello Nunzio, Head of Debt Investments, Generali Real Estate Andrew Radkiewicz, Global Head of Private Debt Strategy and Investor Solutions, PGIM Real Estate Duncan Scorey, Director, Private Capital & Fixed Income, Capital Generation Partners



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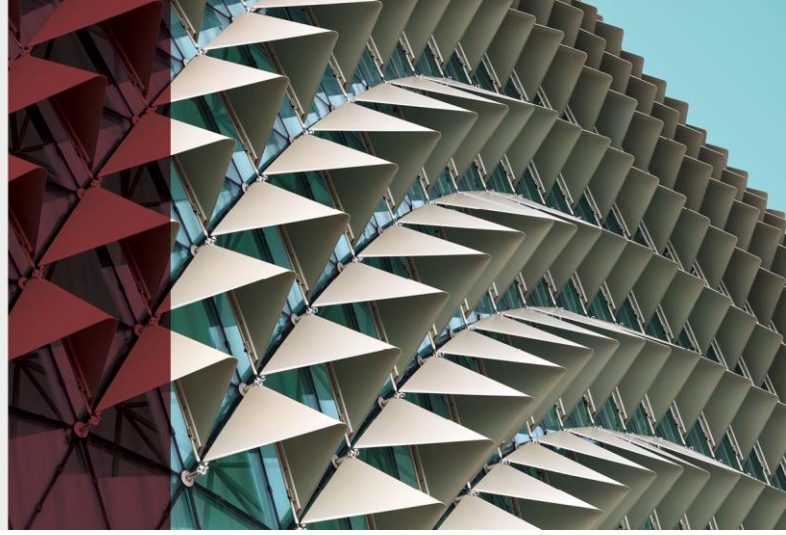
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16.40	Closing keynote fireside chat: POBA
–	
17.10	Moderator: Hannah Jeong, Head of Valuation & Advisory Services, Colliers International Speaker: Dong Hun Jang, Chief Investment Officer, Public Officials Benefit Association (POBA)
17.15	Closing remarks and the end of Conference <i>Virtual private meetings open until midnight Friday 20th November, networking continues until 28 February 2021</i>

The agenda is subject to change.

PERE ASIA SUMMIT

17-18 November 2020 | A PERE virtual event | UTC+8

The place where the most influential industry decisions are made, the **PERE Asia Summit** will gather over 700 attendees again to strengthen their strategies and relationships. Joining the flagship conference as part of PERE Asia Week is the 2nd annual **PERE Debt Forum** on 16 June, a digital meeting place of the investors allocating to global debt to discuss their strategies and drive forward the increasingly popular investment strategy.

This year's virtual experience allows you to arrange unlimited 1-to-1 video meetings around your schedule, gain immediate insight from live-streamed and on-demand sessions, and catch up with global peers about various current topics. Join the most significant institutional investors, fund and asset managers, developers, advisors, and strategic partners, in the development of global real estate and create unrivalled opportunities for your business.

Tuesday 17 November 2020 – Global Trends

0900 Virtual Platform Tutorial and Q&A

Learn how to make the most of your access to a virtual PERE Asia with the help of our PEI Media team.



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→ **0920** Tutorial live Q&A

0930 PERE Asia Networking Lounge

- ▶ **VIP Delegates and LP Networking Lounge (by invitation only)**
- ▶ **Women in Real Estate - Roundtable**

1000 Opening Remarks

- Florian Nuessel, *Conference Producer*, **PERE**

1015 Opening Keynote: Bill Schwab – The future of real estate investing: A decade of change to come from pricing to procedures and more

- *Presenter:* Bill Schwab, *Founding Partner*, **LCI Real Estate Investments** & *Former Global Head of Real Estate*, **ADIA**

1045 Economic insights – Hong Kong, Asia and the state of the global economy

Presenter: Alicia Garcia-Herrero, *Chief Economist for Asia Pacific*, **NATIXIS**

1125 Institutionals discussion – Asset owner perspectives on private real estate – Moving capital up the risk curve?

Speakers:

- Alexandra Crossing, *Region Head Asia Pacific*, **CBRE Global Investment Partners**
- Natalie Hong, *Investment Officer – Real Assets*, **United Nations Joint Staff Pension Fund**
- Stefan Mächler, *Group Chief Investment Officer*, **Swiss Life**
- Bill Shaw, *Head of Real Estate Asia*, **Zurich Insurance**

Moderator: Jason Ng, *Partner & Co-Chair*, *Global Investment Funds Group*, **Baker McKenzie**

→ **Followed by live Q&A**

1205 Specialist Roundtable: Fundraising in the new era

Host: **Baker & McKenzie**



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1235 Networking lunch and private meetings

1400 PERE Direct and Co-Investment: Taking the reins?

Speakers:

- Joyce Chow, *Investment Manager, Real Estate, Teacher Retirement System of Texas*
- Catherine Hong, *Managing Director, Morgan Stanley Investment Management*
- Paul Gillen, *Managing Director, Hodges Ward Elliot*
- Kevin Colket, *Founder and CEO, Global Hospitality Investment Group (GHIG)*

Moderator: TBC, Reed Hastings

→ Followed by live Q&A

1440 The asset class of the hour? – Logistics

Speakers:

- Chua Tiow Chye, *Deputy Group Chief Executive Officer, Mapletree*
- Michael Levy, *Chief Executive Officer, Crow Holdings*
- 3rd speaker TBC

Moderator: Shirin Tang, Managing Partner, Morrison & Foerster

→ Followed by live Q&A

1520 PERE Tech: Driving the future of real estate in the new era

Speakers:

- Bernie Devine, *Regional Director, Yardi*
- Adrian Lai, *Chief Executive Officer, Liquefy*
- Sung Lee, *Executive Vice President, Global Accounts, Altus Group*
- Nick Moore, *Founder & Executive Director, Lionpoint Group*

Moderator: TBC



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→ Followed by live Q&A

1600 Keynote Session: Follow the leaders – where are the global real estate experts seeing growth in a post-covid world?

Speakers:

- Mark Fogle, *Managing Director, Baring Private Equity Asia*
- Chung Keun Kim, *Managing Director and Chief Investment Officer, Samsung SRA Asset Management*
- Ellen Ng, *Managing Director and Head of China Real Estate, Warburg Pincus*
- Christoph Schumacher, *Global Head, Real Estate, Credit Suisse Asset Management*

Moderator: Christie Ou, Reporter, PERE

→ Followed by live Q&A

1700 PERE Quiz & Speed Networking Round

1740 Closing remarks

1745 Private Meetings open until 23.59

Wednesday 18 November 2020 – Global markets, PERE Insights

1000 Opening interview day two – Surviving vs thriving
Followed by Q&A with Chris

Speaker: Christopher Heady, Chairman of Asia Pacific & Head of Real Estate Asia, Blackstone
Interviewed by: Evelyn Lee, News Editor, PERE



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1030 Keynote session: APAC's market leaders and the new realities facing investors

Speakers:

- Rushabh Desai, *CEO – Asia Pacific, Allianz Real Estate*
- Craig Duffy, *Managing Director, Fund Management, GLP*
- Stuart Mercier, *Head of Asia, Real Estate, Brookfield*
- Richard Yue, *Chief Executive Officer and Co-Founder, Arch Capital*

Moderator: Andrew Weir, Global Chair, Asset Management and Real Estate, KPMG

→ Followed by live Q&A

1120 Panel: China – Looking beyond the rhetoric: Growth opportunities here and now

Speakers:

- Christine Chan, *Chief Investment Officer (Asia), Link REIT*
- **Speaker TBC, SDP Invest**
- Stanley Ching, *Senior Managing Director and Head of Real Estate, CITIC Capital Holdings*
- John Lien, *CEO Greater China & Managing Director, DLJ Real Estate Capital Partners*
- Yingpei Wang, *Chief Investment Officer, D&J China*

Moderator: Joel Rothstein, Chair Asia Real Estate Practice, Greenberg Traurig, LLP

→ Followed by live Q&A

1210 Networking lunch & private meetings

1330 Australian markets – Maintaining momentum

Speakers:

- Neil Brookes, *Asia Pacific Head, Capital Markets, Knight Frank*
- Deborah Coakley, *Executive General Manager, Funds Management, Dexus*
- Leonie Wilkinson, *Senior Vice-President, Brookfield*

TBC QIC

Moderator: Michael Stackpool, Deputy General Manager & Head of Real Estate Finance, SMBC Australia

1415 America or Europe? - Overseas opportunities for Asian Capital

Speakers:



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- Tony Brown, *Global Head of Real Estate, M&G Real Estate*
- Daniel R Dubrowski, *Head of Capital Formation & Co-Founder, Lionstone Investments / Columbia Threadneedle*

Moderator: Oliver s'Jacob, Partner, Morrison & Foerster

1515 **Roundtables : Expanding portfolios in...**

Just like a roundtable at a traditional conference, you will be face-to-face with likeminded peers and a specialist moderator to push forward the asset class.

→New opportunities in Japan

→Continued growth: Korea

1545 **Keynote Interview: APAC leader insights from fundraising to deployment: Gaw Capital**

- Jonathan Brasse, *Senior Editor, Real Estate Group, PERE*
- Goodwin Gaw, *Chairman and Founder, Gaw Capital*

1615 **Closing Remarks and end of content**

- Florian Nuessel, *Conference Producer, PERE*

Live video meetings open until midnight 20th November 2020 – content available on demand and extended networking until 28 February 2021.



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