

Private Debt
Investor

Japan Korea Week

Virtual experience 2020

9-13 November
Virtual event UTC+9

Private Debt Investor's 2nd annual PDI Japan Korea Week will examine the impact of a tumultuous 2020 and create the roadmap for the next decade of capital flow to private debt funds. The event will bring together the most active outbound investors and global GPs in the private credit space to analyse the latest trends in the market, discover new opportunities globally and build valuable connections for business growth. All sessions will be provided with live simultaneous interpretation (delivered in English / Japanese / Korean).

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Featured speakers and organisations:

- Trevor Castledine, Senior Director, Private Markets, **bfinance**
- BK Cheon, Chief Investment Officer, **DGB Life Insurance**
- Kipp deVeer, Director, Partner, Head of Credit Group, **Ares Management Corporation**
- Nicole Douglas, Head of Investor Research, **PEI Media**
- Ari Druker, Director, Loan Origination - Real Estate, Investment Banking Coverage, **Deutsche Securities**
- Jiroo Eoh, Team Head, **ABL Life Insurance**
- Benjamin Fanger, Managing Partner, Founder, **ShoreVest Partners**
- Jayme Younghee Han, Executive Director - Asia Funds Advisory and Distribution, **Jones Lang LaSalle**
- Tas Hasan, Partner and Head of the Investment Team, **Deerpath Capital**
- Tsutomu Ishida, Deputy General Manager, **Tokio Marine & Nichido Fire Insurance**
- Takeshi Ito, Senior Investment Officer & Chief Operation Officer, **AISIN Employees' Pension Fund**
- Ian Jackson, Managing Director and Co-Head of Carlyle Strategic Partners, **The Carlyle Group**
- Kanchan Jain, Managing Director, Head of India Credit, **Baring Private Equity Asia**
- Rakesh Jain, Partner and the Global Head of Private Credit, **Pantheon**
- Mark Jenkins, Managing Director and Head of Global Credit, **The Carlyle Group**
- Seungki Jeong, Manager, **DGB Life Insurance**
- Yoshi Kiguchi, Chief Investment Officer, **West Japan Machinery Pension Fund**
- Adalla Kim, Reporter, **PEI Media**
- Masao Konomi, President, **Konomi Inc**
- Sang Hoon Kim, Head of Alternative Investment, **Meritz Asset Management**
- Sakura Koumi, Senior Investment Officer, **Asset Management One Alternative Investments**
- Janghwan Lee, Managing Director, Financial Investment Group Head, **Lotte Insurance**
- Jin Won Lee, General Manager, **Local Finance Association**
- Daniel D Leger, Managing Director, **MGG Investment Group**
- Brad Marshall, Senior Managing Director, **GSO Capital Partners**
- Patrick Marshall, Head of Private Debt and CLOs, **Federated Hermes, International**

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- Hiroaki Matsunami, Senior Vice President, Global Investment Management Department, **DBJ Asset Management**
- Sandra Lee Montgomery, Partner, **Proskauer**
- Kazuo Nishimura, Chief Product Strategist, **Nomura Funds Research and Technologies**
- Dalit Nuttall, Principal, **West Valley Capital**
- Robert O’Sullivan, Managing Partner - Direct Lending, **Comvest Credit Partners**
- Noriko Ogawa, Investment Director, **Benesse Corporate Pension Fund**
- Brian Olvany, Head of Private Debt – Investment Management, **Zurich Insurance**
- Masashi Ono, Deputy General Manager, **Dai-ichi Life Insurance**
- Carol Lee Park, Managing Director, **CLSA Capital Partners (HK)**
- Haewon Park, Vice President, Global Alternative Investment Division, **Vogo Fund Asset Management**
- Wan Sun Park, Deputy General Manager, **Fubon Hyundai Life Insurance**
- Robert Petty, Co-Chief Executive Officer and Co-Chief Investment Officer, **Fiera Capital**
- Greg Racz, Co-founder and President, **MGG Investment Group**
- David Ross, Managing Director, **Northleaf Capital**
- Patrick Marshall, Head of Private Debt and CLOs, **Federated Hermes, International**
- Ken Shimasaki, Executive Director, Investment Management, **Mitsui & Co. Alternative Investments**
- Jiro Shimpō, President and Chief Executive Officer, **Tasku Advisors**
- Andrew Shin, Head of Investments (Korea), **Willis Towers Watson**
- Kwangjin Sim, Head of Multi-financial Products Team, **Kiwoom Securities**
- Koji Sugauchi, Director and General Manager, Fund Management Department, **Osaka Shoko Shinkin Bank**
- Thomas Swain, Private Fund Group, **Credit Suisse (Hong Kong)**
- Andy Thomson, Senior Editor, Private Debt Investor, **PEI Media**
- Edward Tong, Managing Director, Head of Private Debt Asia, **Partners Group**
- Kyuhuhn Yeon, Head of Global Alternative Investments, **Shinhan BNP Asset Management**
- Ramesh Yesodharan, Head of Credit Strategy, **Sumitomo Mitsui Trust Bank**
- Ji Hye You, Partner, **Proskauer**

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Interactive content: 10, 12 November

Private virtual meetings go live: 9-13 November 6.00-23.59

Extended networking: until the end of December 2020

9 November 2020 (Monday)

6.00 Platform opens for private meetings

Private Debt Investor Seoul Forum 2020

10 November 2020 (Tuesday)

9.00	PDI virtual conference tutorial and Welcome from PDI A quick yet comprehensive walkthrough on how to make most out of your virtual pass
9.05 – 9.25	Keynote: Ares: Is the impending downturn the greatest opportunity or greatest challenge that private debt as an asset class has ever known? <ul style="list-style-type: none">• What effect will the pandemic and subsequent downturn have on competition within the private debt market?• Why is private debt attractive for investors relative to other asset classes?• What changes have we seen to investor and manager behaviour in anticipation of the correction? Speaker: Kipp deVeer, Director, Partner, Head of Credit Group, Ares Management Corporation
9.30 – 10.10	Panel: LP and GPs take a view on the next decade for private debt <ul style="list-style-type: none">• What is fuelling the rise in global private debt?• What are the key learnings from the covid-19 crisis?• Which private debt strategies have come out on top in the face of covid-19 and which have suffered?• What are leading GPs and LPs predicting for the next decade? Moderator: Dalit Nuttall, Principal, West Valley Capital Speakers: Janghwan Lee, Managing Director, Financial Investment Group Head, Lotte Insurance Robert O'Sullivan, Managing Partner - Direct Lending, Comvest Credit Partners Greg Racz, Co-founder and President, MGG Investment Group

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	David Ross, Managing Director, Northleaf Capital
10.15	Networking Lounge: Meet the investors and gatekeepers
10.45 – 11.25	Panel: Emerging from chaos: Is the US mid-market still driving exceptional returns? <ul style="list-style-type: none">• What does the mid-market direct lending market look like now?• Major strategies and regions providing exceptional returns• Incentives and deterrents to deploying capital in the mid-market Moderator: Sandra Lee Montgomery, Partner, Proskauer Speaker: Tas Hasan, Partner and Head of the Investment Team, Deerpath Capital Rakesh Jain, Partner and the Global Head of Private Credit, Pantheon Brad Marshall, Senior Managing Director, GSO Capital Partners
11.30 – 12.00	'Meet the Speakers' & Interactive Roundtable: Looking beyond 2020 - Private debt opportunities in developed markets <p><i>All speakers and participants may join an interactive discussion on where they are seeing the next big opportunities in the private credit space. Roundtables create a space for you to be directly involved in the conversation, share your thoughts on key topics and learn what other GPs and LPs are thinking in terms of future-strategy and allocations.</i></p> Influencers: Daniel D Leger, Managing Director, MGG Investment Group Ji Hye You, Partner, Proskauer Speakers: Kipp deVeer, Benjamin Fanger, Janghwan Lee, Robert O'Sullivan, David Ross
12.00 –	Lunch break
13.00 – 13.20	'Meet the Speakers' & Interactive Roundtable: Corporate debt vs real asset debt <p><i>All speakers and participants may join an interactive discussion on the private debt investing in financial vs non-financial assets. Roundtables create a space for you to be directly involved in the conversation, share your thoughts on key topics and learn what other GPs and LPs are thinking in terms of future-strategy and allocations.</i></p> Influencers:

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	<p>Jiroo Eoh, Team Head, ABL Life Insurance Jayme Younghee Han, Executive Director - Asia Funds Advisory and Distribution, Jones Lang LaSalle Seungki Jeong, Manager, DGB Life Insurance</p>
13.25 – 14.05	<p>Panel: Korean LPs cut to the chase: How committed are they to private debt and building new private credit manager relationships?</p> <ul style="list-style-type: none">• How do LPs currently view private debt?• Are LPs prepared to commit to funds without seeing managers face to face? How does restricted travel affect LP / GP relationships?• What are the most pressing challenges facing asset allocations?• What do Korean investors want from their global fund managers and local asset managers? <p>Moderator: Andrew Shin, Head of Investments (Korea), Willis Towers Watson Speakers: BK Cheon, Chief Investment Officer, DGB Life Insurance Jin Won Lee, General Manager, Local Finance Association Wan Sun Park, Deputy General Manager, Fubon Hyundai Life Insurance</p>
14.10 – 14.50	<p>Panel: What is driving investors to commit to Asia's credit markets?</p> <ul style="list-style-type: none">• What opportunities and key challenges lie ahead for private debt in Asia?• What should investors be aware of when approaching different markets across Asia?• How are different managers approaching open-ended and closed-ended vehicles and what are potential considerations for each?• What are the opportunities at the larger end of the market versus the mid-market? <p>Moderator: Thomas Swain, Private Fund Group, Credit Suisse (Hong Kong) Speakers: Benjamin Fanger, Managing Partner, Founder, ShoreVest Partners Carol Lee Park, Managing Director, CLSA Capital Partners (HK) Edward Tong, Managing Director, Head of Private Debt Asia, Partners Group</p>
14.55	<p>Networking Lounge: Meet the investors and gatekeepers</p>
15.25 – 15.45	<p>Keynote: Carlyle on the future of global private debt investment</p>

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	<p>Speaker: Mark Jenkins, Managing Director and Head of Global Credit, The Carlyle Group</p>
15.50 – 16.30	<p>Panel: Korean gatekeepers' perspectives on private debt allocations during and after the pandemic</p> <ul style="list-style-type: none">• What are the key private market trends viewed by Korean investment professionals?• The role of the AMCs and securities firms in the fund manager selection and monitoring process• Covid-19 vs GFC: what did gatekeepers learn from the lessons? <p>Moderator: Haewon Park, Vice President, Global Alternative Investment Division, Vogo Fund Asset Management</p> <p>Speakers: Sang Hoon Kim, Head of Alternative Investment, Meritz Asset Management Kwangjin Sim, Head of Multi-financial Products Team, Kiwoom Securities Kyuhuhn Yeon, Head of Global Alternative Investments, Shinhan BNP Asset Management</p>
16.35 - 16:50	<p>Fireside chat: Navigating a hard contraction - European mid-market lending</p> <ul style="list-style-type: none">• What does the mid-market direct lending market look like now?• Major strategies and regions providing exceptional returns• Incentives and deterrents to deploying capital in the mid-market <p>Moderator: Trevor Castledine, Senior Director, Private Markets, bfinance</p> <p>Speaker: Patrick Marshall, Head of Private Debt and CLOs, Federated Hermes, International</p>
16.55 – 17.15	<p>Keynote fireside chat: POBA</p> <p>Moderator: Adalla Kim, Reporter, PEI Media</p> <p>Speaker: Dong Hun Jang, Chief Investment Officer, Public Officials Benefit Association (POBA)</p>

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17.20 – 17.50	<p>'Meet the Speakers' & Interactive Roundtable: Which credit strategy will gain traction in Q4 onwards?</p> <p><i>All speakers and participants may join an interactive discussion on which strategies will prove most attractive as the year closes out and into 2021. Roundtables create a space for you to be directly involved in the conversation, share your thoughts on key topics and learn what other GPs and LPs are thinking in terms of future-strategy and allocations.</i></p> <p>Influencer: Robert Petty, Co-Chief Executive Officer and Co-Chief Investment Officer, Fiera Capital</p> <p>Speakers: Dong Hun Jang, Patrick Marshall, Wan Sun Park, Andrew Shin, Kwangjin Sim, Kyuhuhn Yeon</p>
18.00	<p>Closing remarks and the end of content sessions</p> <p>Private meetings open until Friday 13th November, networking continues and on-demand access to session content until 31st December 2020</p>

The agenda is subject to change.

Private Debt Investor Tokyo Forum 2020

12 November 2020 (Thursday)

Virtual event - All timings are based on JST / UTC +9

9.00	<p>PDI virtual conference tutorial and Welcome from PDI</p> <p>A quick yet comprehensive walkthrough on how to make most out of your virtual pass</p>
9.05 – 9.25	<p>Keynote: Ares: Is the impending downturn the greatest opportunity or greatest challenge that private debt as an asset class has ever known?</p> <ul style="list-style-type: none"> • What effect will the pandemic and subsequent downturn have on competition within the private debt market? • Why is private debt attractive for investors relative to other asset classes? • What changes have we seen to investor and manager behaviour in anticipation of the correction? <p>Speaker: Kipp deVeer, Director, Partner, Head of Credit Group, Ares Management Corporation</p>
9.30 – 10.10	<p>Panel: How the investment landscape for private debt is developing in response to covid-19?</p> <ul style="list-style-type: none"> • Which markets will bounce back fastest from pandemic?

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	<ul style="list-style-type: none">• What a private credit deal looks like today and over multiple cycles?• Are sponsor-backed transactions still appealing and what benefits do they offer private lenders? <p>Moderator: Dalit Nuttall, Principal, West Valley Capital</p> <p>Speakers: Greg Racz, Co-founder & President, MGG Investment Group David Ross, Managing Director, Northleaf Capital</p>
10.15	Networking Lounge: Meet the investors and gatekeepers
10.50 – 11.20	Panel: Unravelling the mysteries of private debt for investors: Are LPs still hesitant to take the plunge? <ul style="list-style-type: none">• Nuances of investing in private debt – how it compares to private equity investing• What is giving LPs the confidence to increase allocations to private debt after a pandemic?• What is the Japanese LP's risk appetite and geographic focus? <p>Moderator: Kazuo Nishimura, Chief Product Strategist, Nomura Funds Research and Technologies</p> <p>Speakers: Masao Konomi, President, Konomi Inc Hiroaki Matsunami, Senior Vice President, Global Investment Management Department, DBJ Asset Management Ken Shimasaki, Executive Director, Investment Management, Mitsui & Co. Alternative Investments</p>
11.25 – 11.55	'Meet the Speakers' & Interactive roundtable: Which credit strategy will gain traction in Q4 onwards? <p><i>All speakers and participants may join an interactive discussion on which strategies will prove most attractive as the year closes out and into 2021. Roundtables create a space for you to be directly involved in the conversation, share your thoughts on key topics and learn what other GPs and LPs are thinking in terms of future-strategy and allocations.</i></p> <p>Influencers: Daniel D Leger, Managing Director, MGG Investment Group</p>

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	Robert O'Sullivan, Managing Partner - Direct Lending, Comvest Credit Partners <i>Speakers: Kipp deVeer, Benjamin Fanger, Sakura Koumi, Kazuo Nishimura, David Ross, Koji Sugauchi</i>
12.00	Lunch break
13.00 – 13.30	Panel: How investors are addressing risk during the pandemic <ul style="list-style-type: none"> How is risk assessment and management changing in response to Covid-19? How does the risk-return profile compare in private debt vs alternative asset classes? What lessons to take forward from Covid-19, what to do if a pandemic strikes again? <p>Moderator: Ari Druker, Director, Loan Origination - Real Estate, Investment Banking Coverage, Deutsche Securities Inc</p> <p>Speakers: Sakura Koumi, Senior Investment Officer, Asset Management One Alternative Investments Noriko Ogawa, Investment Director, Benesse Corporate Pension Fund Koji Sugauchi, Director and General Manager, Fund Management Department, Osaka Shoko Shinkin Bank</p>
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14.20 –	Networking Lounge: Meet the investors and gatekeepers

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14.55 – 15.15	<p>Global LP keynote fireside chat: Zurich Insurance</p> <p>Speaker: Brian Olvany, Head of Private Debt – Investment Management, Zurich Insurance</p> <p>Interviewed by Andy Thomson, Senior Editor, <i>Private Debt Investor</i>, PEI Media</p>
15.15 – 15.55	<p>Panel: Prepare to ride the wave of distressed and special situations</p> <ul style="list-style-type: none">• Where are the pockets of opportunity in this vast market?• How can distressed funds make the current environment work for them?• What can accelerate or derail future growth? <p>Moderator: Damon Krytzer, Managing Director, Probitas Partners</p> <p>Speakers:</p> <p>Benjamin Fanger, Managing Partner, Founder, ShoreVest Partners</p> <p>Ian Jackson, Managing Director and Co-Head of Carlyle Strategic Partners, The Carlyle Group</p> <p>Kanchan Jain, Managing Director, Head of India Credit, Baring Private Equity Asia</p>
16:00 – 16:30	<p>Panel: Navigating a hard contraction - European mid-market lending</p> <ul style="list-style-type: none">• What does the mid-market direct lending market look like now?• Major strategies and regions providing exceptional returns• Incentives and deterrents to deploy capital <p>Moderator: Trevor Castledine, Senior Director, Private Markets, bfinance</p> <p>Speakers:</p> <p>Patrick Marshall, Head of Private Debt and CLOs, Federated Hermes, International</p> <p>Ramesh Yesodharan, Head of Credit Strategy, Sumitomo Mitsui Trust Bank</p>
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