

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 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. [Virtual experience](#) is now available offering limitless cross-border access to the global private debt's most influential community and 5 days' unlimited virtual private meeting from 9 – 13 November. On-demand content, attendee list and direct messaging are available **until the end of 2020**.

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Supporting association



Featured speakers and organisations:

- Jingjing Bai, Advisor, **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**
- Jayme Younghee Han, Executive Director - Asia Funds Advisory and Distribution, **Jones Lang LaSalle**
- 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**
- 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**

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- Jin Won Lee, General Manager, **Local Finance Association**
- 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**
- 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)**
- Won Joon Park, CEO, **DS Networks Asset Management**
- Michael Patterson, Governing Partner, **HPS Investment Partners**
- 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 Shimpo, President and Chief Executive Officer,, **Tasku Advisors**
- Andrew Shin, Head of Investments (Korea), **Willis Towers Watson**
- Koji Suguchi, 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**
- Ramesh Yesodharan, Head of Credit Strategy, **Sumitomo Mitsui Trust Bank**

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Private Debt Investor Japan Korea Week 2020

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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

14.00 PDI Seoul Forum - News and data showcase

14.30 PDI Seoul Forum - Highlights from Private Debt Investor's LP Perspectives Study

15.00 Korean LPs Networking (LP only by invitation)

Private Debt Investor Seoul Forum 2020

10 November 2020 (Tuesday)

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

8.30 Tutorial in English

8.30 Tutorial in Korean

9.00 Welcome from PDI

9.10 **Keynote: Ares: Is the impending downturn the greatest opportunity or greatest challenge that private debt as an asset class has ever known?**

- What are the impacts that the pandemic and subsequent downturn will 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?

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Japan Korea Week

Virtual experience 2020

9-13 November
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Speaker: Kipp deVeer, Director, Partner, Head of Credit Group, **Ares Management Corporation**

Followed by live Q&A with the speaker

9.40 **Panel: LP and GPs take a view on the next decade for private debt**

- What is fuelling the rise in global private debt?
- What are the key learnings from the covid-19 crisis?
- Which private debt strategies have emerged well in the face of covid-19 and which have suffered?
- What are leading GPs and LPs predicting for the next decade?
- Will ESG investing be the new norm?

Moderator: Dalit Nuttall, Principal, **West Valley Capital**

Speakers:

Janghwan Lee, Managing Director, Financial Investment Group Head **Lotte Insurance**

Greg Racz, Co-founder and President, **MGG Investment Group**

David Ross, Managing Director, **Northleaf Capital**

Followed by live Q&A with the speakers

10.20 **Panel: Emerging from chaos: Is the US mid-market still driving exceptional returns?**

- What does the mid-market direct lending market look like now?
- Major strategies and regions providing exceptional returns
- Incentives and deterrents to deploy capital

Moderator: Sandra Lee Montgomery, Partner, **Proskauer**

Speaker: Rakesh Jain, Partner and the Global Head of Private Credit, **Pantheon**

Followed by live Q&A with the speakers

11.00 **Interactive Roundtables**

Japan Korea Week

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Session 1: US middle market direct lending

Session 2: Senior debt vs Mezzanine

11.30 Panel: Korean LPs cut to the chase: How committed are they to private debt and to building new private credit manager relationships?

- 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?

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**

Followed by live Q&A with the speakers

12.10 Panel: What is driving investors to commit to Asia's credit markets?

- Opportunities and key challenges 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? How does it differ in type and attractiveness with more mid-market plays?

Moderator: Thomas Swain, Private Fund Group, **Credit Suisse (Hong Kong)**

Speakers:

Carol Lee Park, Managing Director, **CLSA Capital Partners (HK)**

Robert Petty, Co-Chief Executive Officer and Co-Chief Investment Officer, **Fiera Capital**

Edward Tong, Managing Director, Head of Private Debt Asia, **Partners Group**

Followed by live Q&A with the speakers

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12.50 **Interactive Roundtables**

Session 1: Private debt in merging market

Session 2: VIP and LP Lounge

14.00 **Panel: Alternative alternatives: Real asset debt in focus**

- Opportunities seeing in real asset debt and specialty finance
- Risks and returns compare to corporate debt
- Why real asset debts fit into a mixed asset portfolio or something else?

Moderator: Jayme Younghee Han, Executive Director - Asia Funds Advisory and Distribution, **Jones Lang LaSalle**

Speaker:

Jiroo Eoh, Team Head, **ABL Life Insurance**

Followed by live Q&A with the speakers

14.30 **Keynote fireside chat: POBA**

Moderator: Adalla Kim, Reporter, **PEI Media**

Speaker: Dong Hun Jang, Chief Investment Officer, **Public Officials Benefit Association (POBA)**

15.00 **Interactive Roundtables**

Session 1: Europe middle market direct lending

Session 2: Distressed & special situations

15.30 **Panel: Korean gatekeepers' perspectives on the private debt investing**

- What are the key private debt trends viewed by Korean professionals?
- Has appetite risen amongst Korean investors? What drives their investment? How has Covid-19 affected their strategies?
- The role of the AMCs and security firms in the monitoring process, how do they help select and monitor GPs?

Moderator: Won Joon Park, CEO, **DS Networks Asset Management**

Speaker: Sang Hoon Kim, Head of Alternative Investment, **Meritz Asset Management**

Followed by live Q&A with the speakers 16.00

Japan Korea Week

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16.00 **Panel: Navigating a hard contraction - European mid-market lending**

- What does the mid-market direct lending market look like now?
- Major strategies and regions providing exceptional returns
- Incentives and deterrents to deploy capital

Speaker: Patrick Marshall, Head of Private Debt and CLOs, **Federated Hermes, International**

Followed by live Q&A with the speakers

16.30 **Keynote: Carlyle on the future of global private debt investment**

Speaker: Mark Jenkins, Managing Director and Head of Global Credit, **The Carlyle Group**

17.00 Closing remarks

Private meetings open until Friday 13th November, networking continues and on-demand access to session content until 31st December 2020

Private Debt Investor Japan Korea Week 2020

11 November 2020 (Wednesday)

06.00 **Platform opens for networking**

14.00 **PDI Tokyo Forum - News and data showcase**

14.30 **PDI Tokyo Forum - Highlights from Private Debt Investor's LP Perspectives Study**

15.00 **Japanese LPs Networking (LP only by invitation)**

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Private Debt Investor Tokyo Forum 2020

12 November 2020 (Thursday)

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

8.30 **Tutorial in English** followed by Q&A

8.30 **Tutorial in Japanese** followed by Q&A

9.00 **Welcome from PDI**

9.10 **Keynote: Ares: Is the impending downturn the greatest opportunity or greatest challenge that private debt as an asset class has ever known?**

- What are the impacts that the pandemic and subsequent downturn will 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**

Followed by live Q&A with the speaker

9.40 **Panel: How the landscape for private debt is developing in response to covid-19?**

- Which markets will bounce back fastest from pandemic?
- What a private credit deal looks like today and over the multiple cycles?
- Are sponsor-backed transactions still appealing and what benefits do they offer private lenders?

Moderator: Dalit Nuttall, Principal, **West Valley Capital**

Speakers:

Greg Racz, Co-founder & President, **MGG Investment Group**

David Ross, Managing Director, **Northleaf Capital**

Followed by live Q&A with the speakers

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10.20 **Interactive Roundtables**

Session 1: US middle market direct lending

Session 2: Senior debt vs Mezzanine

10.50 **Panel: Risk vs reward: Do China and India's private credit markets align with Japanese LP investment mandates?**

- What is the outlook for private debt in China and India in a time of crisis?
- What are the remaining differences between the China and Indian markets?
- What role does regulation and standardisation have to play?
- Which credit strategy will gain more traction from Q4 onwards?

Followed by live Q&A with the speakers

11.30 **Panel: What are the top issues on the agenda for investors who allocate to the private debt?**

- What are the latest trends to manage and mitigate risk in these times of pandemic?
- How does the risk-return profile compare in private debt vs alternative asset classes?
- Risk management and investment: What are the lessons learnt from Covid-19 and what to do if pandemics strike again?

Moderator: Ari Druker, Director, Loan Origination - Real Estate, Investment Banking Coverage, **Deutsche Securities Inc**

Speakers:

Sakura Koumi, Senior Investment Officer, **Asset Management One Alternative Investments**

Koji Sugauchi, Director and General Manager, Fund Management Department, **Osaka Shoko Shinkin Bank**

Followed by live Q&A with the speakers

12.10 **Panel: What is driving investors to commit to Asia's credit markets?**

- Opportunities and key challenges ahead for private debt in Asia

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- 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? How does it differ in type and attractiveness with more mid-market plays?

Moderator: Thomas Swain, Director, Private Fund Group, **Credit Suisse (Hong Kong)**

Speakers:

Carol Lee Park, Managing Director, **CLSA Capital Partners (HK)**

Robert Petty, Co-CEO and Co-CIO, **Fiera Capital**

Edward Tong, Managing Director, Head of Private Debt Asia, **Partners Group**

Followed by live Q&A with the speakers

12.50 **Interactive Roundtables**

Session 1: Private debt in merging market

Session 2: VIP and LP Lounge

14.00 **Panel: Unravelling the mysteries of private debt for investors: Why are some LPs still hesitant to take the plunge?**

- 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 are Japanese LPs' risk appetite and geographic focus?

Moderator: Kazuo Nishimura, Chief Product Strategist, **Nomura Funds Research and Technologies**

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**

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Followed by live Q&A with the speakers

14.40 **Panel: Prepare to ride the wave of distressed and special situations**

- Where are the opportunities in the enormous market?
- How can distressed funds make the current environment work for them?
- What are factors that accelerate or derail future growth?

Moderator: Jingjing Bai, Advisor, **Bfinance**

Speakers:

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**

Followed by live Q&A with the speakers

15.10 **Interactive Roundtables**

**Session 1: Europe middle market
direct lending**

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15.40 **Panel: Navigating a hard contraction - European mid-market lending**

- What does the mid-market direct lending market look like now?
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Speakers:

Patrick Marshall, Head of Private Debt and CLOs, **Federated Hermes, International**

Ramesh Yesodharan, Head of Credit Strategy, **Sumitomo Mitsui Trust Bank**

Followed by live Q&A with the speakers

16.10 **Global LP keynote fireside chat: Zurich Insurance**

Speaker: Brian Olvany, Head of Private Debt – Investment Management, **Zurich Insurance**

Interviewed by Andy Thomson, Senior Editor, *Private Debt Investor*, **PEI Media**

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16.40 **Panel: Japanese LPs cut to the chase: How committed are they to private debt and to building new private credit manager relationships?**

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Moderator: Jiro Shimpo, President and Chief Executive Officer, **Tasku Advisors**

Speakers:

Tsutomu Ishida, Deputy General Manager, **Tokio Marine & Nichido Fire Insurance**

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

Yoshi Kiguchi, Chief Investment Officer, **West Japan Machinery Pension Fund**

Masashi Ono, Deputy General Manager, **Dai-ichi Life Insurance**

Followed by live Q&A with the speakers

17.20 **Closing remarks**

Private meetings open until Friday 13th November, networking continues and on-demand access to session content until 31st December 2020

The agenda is subject to change.