



Infrastructure  
Investor

# Valuations Deep Dive

24 March 2021, 10:00 GMT/UTC (Virtual)

Are infrastructure fund managers adequately  
measuring covid's impact on their portfolios?

PEI



# Agenda

**10.00 Infrastructure Investor Welcome**

**10.05 Speed networking**

**10.30 Has the market accurately assessed valuations through the pandemic?**

- Fair value, cash flows and risk premia: the impact of covid on each component and what it means for asset performance
- Long-term cash flows and present value: can investors ignore short term fluctuations in valuations in illiquid assets?
- Is infrastructure expensive now? Should it be?

**11:10 Meet the speakers Q&A and networking**

**11:40 Close of Deep Dive**

# Join the global discussions

## Moderator:

**Adam Smallman**, Director – Membership Programs, PEI Media

## Speakers:



**Annette Bannister**

Head of European  
Infrastructure, MetLife  
Investment Management



**Frederic Blanc-Brude**

Director, EDHECinfra & CEO,  
Scientific Infra



**Colin Simpson**

Head of Asset Management,  
LPPI





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