

PERE

Asia Summit 2021

16-17 November
Hong Kong, Singapore, Tokyo and Virtual



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Conference programme

Day one – Virtual experience

16 November 2021 | Tuesday (all times are in Hong Kong/Singapore time zone)
Simultaneous translation in Japanese, Korean and English

0900 Panel: State of the global industry

- Maintaining relationships and building partnerships during covid
- Investment opportunities in North America
- One year in – how Biden's tax plan impact real estate in the US
- How sustainability standards ensure success for investors and communities

Robert Ford, Chief Executive Officer, **Realterm**

Joyce Chow, Director – Real Estate, Investment Management Division, **Teacher Retirement System of Texas**

Dan Dubrowski, Co-Founder and Head of Capital Formation, **Lionstone Investments**

Paul Gillen, Managing Director, **Hodges Ward Elliott**

Michael Levy, Chief Executive Officer, **Crow Holdings**

Speaker, CIM

0950 Panel: Investor strategies on funds, direct and co-investments

- Sectors that will become appealing to real estate investors in 2022
- Safe-haven markets for investors post-covid and how geopolitics affect investment behaviour
- What type of investment strategies benefit LPs the most?

Shirin Tang, Managing Partner, **Morrison and Foerster**

Tinchuck Ng, Managing Director, Head of Investments, **Cottonwood Group**

Doyle Kim, Managing Director, **Hana Financial Investment**

Koki Fukui, Director, Real Estate Finance, **Development Bank of Japan**

Chung Keun Kim, Managing Director and Chief Investment Officer, **Samsung SRA**

Aditya Bhargava, Senior Portfolio Manager, **Abu Dhabi Investment Authority**



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1040 Panel: China and the Greater Bay Area

- Betting on the future – what does the GBA hold for real estate investors and how does this affect the Hong Kong property market?
- How are the office and logistics sectors fairing in China in the current environment? What are the niche sectors to look out for?
- What is the secret sauce for developers to succeed in this increasingly competitive market?

Tammy Tang, Managing Director, China, **Colliers**

Hank Hsu, Co-Founder and CEO, **Forest Logistics**

Yingpei Wang, Chief Investment Officer, **D&J China**
Speaker, Hines

1130 Panel: Spotlight on Australia

- Beyond the mainstream, where should investors look for diversification?
- New fund strategies for investors – what would make them stand out?
- Managing assets under current travel restrictions
- Repurposing retail – what can be done?

Deborah Coakley, Executive General Manager, **Dexus**

Jennifer Johnstone-Kaiser, Principal Consultant, Property Leader, **Frontier Advisors**

Grace Szeto, Investment and Operations Manager, **Christian Super**

Break

1420 Panel: Opportunities and challenges in debt funds in the post-covid world

- Diversifying from equity to debt – why are the biggest investors dipping their toes in the sector?
- Where do the boundaries of an ESG-focused lender's responsibility lie when structuring a deal?
- Dislocated sectors and distressed opportunities – putting capital to work in an uncertain economic environment
- Looking ahead: realistic expectations and predictions for the next 5 years for real estate debt

Joel Rothstein, Chair of Real Estate Practice, **GreenbergTraurig**

Sabine Schaffer, Managing Partner, **Pro-Invest Group**

Sueng-Ki Jeong, Manager, Asset Management, **DGB Life Insurance**

Alberto Agazzi, Chief Executive Officer and General Manager GRE SGR, **Generali Real Estate**



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1510 Presentation

Henrike Waldburg, Head of Investment Management Global, **Union Investment**
Followed immediately by investor-only roundtable:
Real estate sectors that Japanese and Korean LPs should not miss

Break

1600 Panel: ESG – shaping positive outcomes

- E: carbon neutral by 2050: how are leading managers advancing decarbonization?
- S: addressing social and economic issues through sustainable investments. How important is “social” in different countries?
- G: how good governance can reduce operational and reputational risks

Anne Gales, Partner, **Threadmark**

Nina Reid, Head of Responsible Property Investment, **M&G Real Estate**

Ruben Langbroek, Head of APAC, **GRESB**

Speaker, **Grosvenor**

1650 Panel: Spotlight on Europe

- Comparing and contrasting different markets in Europe
- The rise of ESG and the evolution of regulations in the region
- Sectors that are poised for growth after the pandemic
- Innovations in asset management in the current era

Jose Pellicer, Head of Investment Strategy, **M&G Real Estate**

Adrian Karczewicz, Head of Divestments, **Skanska**

Gianlorenzo Paoletta, Senior Director, European Real Estate Investment, **Korea Investment Corporation**

Lisa Graham, Head of EMEA Industrial Research, **Cushman & Wakefield**

End of day one



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Day two – In-person and virtual

17 November 2021 | Wednesday (all times are in local time zone)
Simultaneous translation in Japanese and English in Tokyo

Grand Hyatt, Hong Kong	Sofitel City Centre, Singapore	Shangri-La, Tokyo
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Hong Kong	Singapore	Tokyo
<p>0900 Keynote panel: Driving capital to Asia-Pacific hotspots, what's next on the horizon?</p> <ul style="list-style-type: none"> State of play – real estate after the pandemic Evaluating the effects of covid on developed and emerging markets Assessing valuations in listed vs. private markets. Are investors getting maxed out? How important is ESG in Asia? <p>Kim Wright, Managing Director, CPPIB Peter Kim, Managing Director, Asia, QuadReal Property Group</p>	<p>0900 Keynote panel: Driving capital to Asia-Pacific hotspots, what's next on the horizon?</p> <ul style="list-style-type: none"> State of play – real estate after the pandemic Evaluating the effects of covid on developed and emerging markets Real estate valuations post-pandemic How important is ESG in Asia? <p>Richard Massey, Senior Vice President, GIC Jai Mirpuri, Country Head, Singapore and Thailand, ESR</p>	<p>0900 Keynote panel: Investing in global real estate post pandemic</p> <ul style="list-style-type: none"> Where should Japanese LPs start to allocate globally? What geographies and sectors? Understanding and managing risk

Hong Kong	Singapore	Tokyo
<p>1000 Keynote address:</p> <p>Asian Real Estate After Covid <i>BlackRock reveals their secrets on investing for the soaring 20's, opportunities that should not be missed and sustainable investing on the road to net zero.</i></p>	<p>1000 Keynote address:</p> <p>Looking Beyond the Pandemic <i>Asia-Pacific's leading real assets manager predicts what the future holds for real estate investors as the world goes into recovery.</i></p>	<p>1000 Keynote address:</p>



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John Saunders, Managing Director, Head of APAC Real Estate, BlackRock	John Lim, Co-Founder and Deputy Chairman, ARA Asset Management	
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1030am Networking coffee break

Hong Kong	Singapore	Tokyo
<p>1100 Panel: Investing in the future of living – why resi still rocks and what are the new occupier demands</p> <ul style="list-style-type: none"> • Multifamily residential • Senior housing and retirement living • Student accommodation • Suburban residential <p>Jinglei Chen, Managing Director and Founding Member, BEI Capital Partners</p>	<p>1100 Panel: Investing in the future of living – why resi still rocks and what are the new occupier demands</p> <ul style="list-style-type: none"> • Multifamily residential • Senior housing and retirement living • Student accommodation • Suburban residential <p>Victoria Garrett, Head of Residential, Asia Pacific, Knight Frank</p>	<p>1100 Panel: Investing in Japan</p> <ul style="list-style-type: none"> • Investing in Tokyo post pandemic – opportunities and threats • Real estate drivers: Logistics and datacentres • Investing in Japan’s regions

Hong Kong	Singapore	Tokyo
<p>1145 Panel: Niche sectors – opportunities for investors after covid</p> <ul style="list-style-type: none"> • Alternative sectors - where can you build scale and boost returns? • Zooming in on the growing digital economy • How big is the potential for life sciences? • Future-proofing the “new economy” sectors 	<p>1145 Panel: Data centres – emerging hotspot</p> <ul style="list-style-type: none"> • Is this an inevitable growth sector? • Addressing the power supply and carbon emission issue in the sector • Infrastructure or real estate – who is best to manage data centres? <p>Jihong He, Chief Corporate Strategy Officer and CEO Data Center, CapitaLand</p>	<p>1145 Panel: Post pandemic growth sectors</p> <ul style="list-style-type: none"> • Global growth areas post pandemic • Core vs Value add strategies • Beyond logistics and datacentres where are the bright spots?



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Laurent Fischler, Head of Investments, Asia Pacific, Ivanhoe Cambridge Claire Tang, Head of Greater China and Co-CIO Asia, LaSalle		
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1230 Virtual panel: Asia as a strategy for portfolio diversification

- Investing in Asian emerging markets vs developed countries – finding the right risk-return balance in region’s geographies
- Local taxation incentives for investments across the region
- How do you build relationships and source partnerships during the pandemic?

Rushabh Desai, Chief Executive Officer Asia-Pacific, **Allianz**

Richard Yue, CEO and CIO, **Arch Capital**

Networking lunch break

Hong Kong	Singapore	Tokyo
<p>1400 Panel: Logistics and industrial – the new retail</p> <ul style="list-style-type: none">• Assessing exit strategies and hold periods• Growth potential in e-commerce market – should you pay attention to last mile delivery?• In a highly-competitive market, is there still value in logistics?	<p>1400 Panel: Niche sectors – opportunities for investors after covid</p> <ul style="list-style-type: none">• Alternative sectors - where can you build scale and boost returns?• Zooming in on the growing digital economy• How big is the potential for life sciences?• Future-proofing the “new economy” sectors <p>Magdalene Chua, Real Estate Assurance Partner, PwC</p>	<p>1400 Panel: Working successfully with Japanese gatekeepers</p> <ul style="list-style-type: none">• Understanding the do’s and don’t’s for pitching LPs• Understanding the role of the gatekeeper in Japan• Building GP/Gatekeeper relationships



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Hong Kong	Singapore	Tokyo
<p>1500 Panel: Office is here to stay – are you?</p> <ul style="list-style-type: none">• De-centralizing or Re-centralizing?• What is the new way of working and how will this develop over time?• Reconfiguring space and office assets to the new occupier – improved buildings, quality design, wellness rating, etc. <p>Tracy Lau, Managing Director, Head of Asia-Pacific Investor Relations, The Carlyle Group Chelsea Perino, Managing Director, The Executive Centre</p>	<p>1500 Panel: Office is here to stay – are you?</p> <ul style="list-style-type: none">• De-centralizing or Re-centralizing?• What is the new way of working and how will this develop over time?• Reconfiguring space and office assets to the new occupier – improved buildings, quality design, wellness rating, etc. <p>Shirley Ng, Deputy CEO, Keppel REIT Management Charlene Huang, Co-Head APAC, Multi-Manager Real Estate, UBS</p>	<p>1500 Panel: Japanese LP investing strategies</p> <ul style="list-style-type: none">• How do LPs currently view Real Estate compared to other alternative asset classes?• Is appetite increasing post pandemic?• Risk appetites amongst investors – are higher risk strategies being considered?

1600 Member-only networking cocktails

1730 End of conference



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