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Asia Summit 2021



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Asia Summit 2021



Conference programme

Day one – Virtual experience

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

0845 Panel: State of the global industry

- Maintaining relationships and building partnerships during covid
- Discover the changing landscape of US real estate
- How sustainability standards ensure success for investors and communities

Moderator: Zoe Hughes, Chief Executive, **NAREIM**

Robert Fordi, 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**

Jolly Singh, Principal, Portfolio Oversight, **CIM**

0945 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?

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

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

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

Isabelle Martin, Senior Vice President, **Ivanhoe Cambridge**

Kate Herfort, Division Director, Client Solutions Group, **Macquarie Group**

1030 Panel: Asia as a strategy for portfolio diversification

- Zooming in on core real estate – is this the best option in the region?
- Investing in Asian emerging markets vs developed countries – finding the right risk-return balance in region's geographies
- Building relationships and sourcing partnerships during the pandemic

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

Tiow Chye Chua, Deputy Group Chief Executive Officer, **Mapletree**



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JR Pearce, Senior Investment Officer, **Sacramento County Employees' Retirement System (SCERS)**

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

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

1115 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?

Moderator: Nina Yang, CEO, **SJ CityGlobal**

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

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

Claire Thielke, Country Head, Greater China, **Hines**

Tim Wang, Co-President of Logistics and Industrial Real Estate, **GLP China**

1205 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?

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

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

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

Greg Lapham, Head of Australia, **Savills Investment Management**

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

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

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



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

Apwinder Foster, Head of Investment Strategy, **DRC Savills Investment Management**

1510 Presentation: Riding the cycle - how to include European real estate markets for global diversification

Henrike Waldburg, Head of Investment Management Global, **Union Investment**

1530 Roundtable: Investing in European real estate markets

- Core real estate – in the constantly changing face of mainstream investing, which sector provides the best returns?
- Niche/alternative sectors – where should investors look for diversification?

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

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

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

Moderator: Anne Gales, Partner, **Threadmark**

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

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

Raphael Mertens, Chief Risk Officer, **Allianz Real Estate**

Pei Ya Boon, Sustainability Manager, Asia, **Arcadis**

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

Moderator: Evelyn Lee, Editor, **PERE**

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**

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

End of day one



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Day two – In-person and virtual

17 November 2021 | Grand Hyatt, Hong Kong
Sessions live-streaming globally

0900 **Keynote panel: Driving capital to Asia-Pacific hotspots, what's next on the horizon?**

- 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 do you find value in a low interest environment?
- How important is ESG in Asia? How do investors factor this into their pricing and investment framework?

Moderator: Christie Ou, Senior Reporter, **PERE**

Kim Wright, Managing Director, **CPPIB**

Peter Kim, Managing Director, Asia, **QuadReal Property Group**

George Hongchoy, Executive Director and Chief Executive Officer, **Link Asset Management**

1000 **Keynote address: Asian Real Estate After Covid**

John Saunders, Managing Director, Head of APAC Real Estate, **BlackRock**

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.

1030 **Networking coffee break**

1100 **Panel: Investing in the future of living**

- How occupier expectations are reshaping residential real estate
- The continued growth of multifamily
- Senior housing and retirement living
- Student accommodation

Moderator: Cathy Huang, Managing Director, **EXS Capital**

Jinglei Chen, Managing Director and Founding Member, **BEI Capital Partners**

Victor Lor, Head of Capital – Asia Pacific, **Global Student Accommodation**

Christine Lin, CEO, **Basel Capital**

Leslie Chua, Senior Vice President and Director of Asia-Pacific Investment Research, **Heitman**



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1150 Panel: Opportunities for investors after covid

- Alternative sectors - where can you build scale and boost returns?
- Zooming in on data centres and the growing digital economy
- How big is the potential for life sciences?
- Future-proofing the “new economy” sectors

Moderator: Zoe Zuo, Co-Head of China Real Estate, **Angelo Gordon**
Laurent Fischler, Head of Investments, Asia Pacific, **Ivanhoe Cambridge**
Claire Tang, Head of Greater China and Co-CIO Asia, **LaSalle**
Leo Lo, Founder, **Asia PropTech**

1240 Networking lunch break

1400 Panel: Logistics and warehousing

- What does the warehouse of the future look like?
- 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?

Moderator: Henry Ching, Head of Asia Real Estate, **Mercer**
David Cheong, Managing Director, Real Estate, **KKR**
Brian Chinappi, Partner, **Actis**
Rachel Tong, Managing Director and Head of Real Estate Private Equity, **Value Partners**
Robert Johnson, Managing Director, **J.P. Morgan**

1500 Panel: Office is here to stay – are you?

- Reconfiguring space and office assets to the new occupier – improved buildings, quality design, wellness rating, etc.
- What is the new way of working and how will this develop over time?
- De-centralizing or Re-centralizing?

Moderator: Alison Cooke, Managing Director – Real Estate, **Starr International Investment Advisors**
Angel Li, Managing Director, Head of Asia, **Macquarie**
Chelsea Perino, Managing Director, **The Executive Centre**
Roberto Versace, Managing Director, **APG**
Phil Kim, Managing Director Asia-Pacific, **Jerde Partnership**

1600 Member-only networking

1700 End of conference



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