

Private Debt  
Investor

# Japan Korea Week 2022

## PDI Japan Korea Week

8-10 November 2022

The 4<sup>th</sup> annual PDI Japan Korea Week, returning as an in-person event, is connecting over 200 of Korea's and Japan's most active outbound investors with the global fund managers and exploring investment opportunities into private debt across the world. The event will continue to bring the private debt veterans and community together for unlimited networking opportunities. Simultaneous translation available between Korean / Japanese and English.

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*The agenda is subject to change.*



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**Niann Lai**  
[niann.l@peimedia.com](mailto:niann.l@peimedia.com)

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<http://privatedebtinvestor.com/japankoreaweek/>

# Japan Korea Week 2022

## Featured speakers and organisations:

- **Keynote:** Yasuyuki Tomita, Executive Director, Head of Private Equity Investments, **Japan Science and Technology Agency**
- Jingjing Bai, Advisor, **Bfinance**
- Xiaodong (Akina) Chang, Fund Manager, **Tokio Marine Asset Management**
- Byung Kyu Cheon, Chief Investment Officer, **DGB Life Insurance**
- Jungik Cho, Head of Alternative Investment Solutions, **Mirae Asset Securities**
- Jin Suk Choi, Head of Sustainable Investment Team, Strategy & Innovation Group, **Korea Investment Corporation**
- Ryan Chung, Managing Director and Head of Principal Investment, **Huatai International**
- Jiroo Eoh, Team Head, **ABL Life Insurance**
- Kevin Griffin, CEO & CIO, **MGG Investment Group**
- Andre Hakkak, CEO, **White Oak**
- Yuko Hara, Director, Alternative Investments Team, **ORIX Life Insurance**
- Woong Hwang, Head of Alternative Investments Solution Department, **Kyobo Securities**
- Tsutomu Ishida, Deputy General Manager, **Tokio Marine & Nichido Fire Insurance**
- Frank Jordan, Partner, **Crestline Investors**
- Kunio Kamoi, Senior Product Manager, Fund Research and Development Division, **Mitsubishi UFJ Trust and Banking Corporation**
- Rok Kim, Senior Manager, **The Korean Teachers' Credit Union**
- Harold Dong Young Kim, Manager, Private Capital Team, **TongYang Life Insurance**
- Yoshi Kiguchi, CIO, **Pension Fund of Japanese Corporations**
- Tomoko Kitao, Managing Director, **Hamilton Lane**
- Keiichi Komori, Managing Director, **DBJ Asset Management**
- Sunkyung Lee, Managing Director, **PineStreet Asset Management**
- Alex Lynn, Hong Kong Bureau Chief, **PEI Media**
- Antonella Napolitano, Managing Director, **Deerpath Capital Advisors**
- David Yoonsuk Oh, Investment Manager, Alternative team, **National Federation of Fisheries Cooperatives**
- Deborah Ogawa, Senior Director, **Fitch Ratings**
- WanSun Park, Head of Alternative Investment Team, **Fubon Hyundai Life Insurance**
- Michael Patterson, Co-founder and Global Head of Direct Lending, **HPS**
- Chantale Pelletier, Global Head of Infrastructure, **Schroders Capital**
- Jeff Pentland, Managing Director, **Northleaf Capital Partners**
- Greg Racz, Co-founder and President, **MGG Investment Group**
- David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- Jiro Shimpo, Alternatives Advisory, **Tasku Advisors**
- Andrew Shin, Head of Investments (Korea), **Willis Towers Watson**
- Eriko Shoji, Director, **Japan Post Bank**
- Eugene So, Head of Global Alternative Investment Department, **IBK Securities**
- Manabu Washio, Head, **Aksia Asia**
- Taehyun Yeom, Principal, **HarbourVest Partners**



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# Japan Korea Week 2022

## PDI Seoul Forum

Connecting South Korea's investors and global private debt leaders

Simultaneous translation between Korean and English

Tuesday 8 November 2022, Fairmont Ambassador Seoul

- 8:00      *Registration and networking breakfast*
- 9:00      *Welcome from PDI and opening remarks*
- 9:10      **Opening panel: Private credit: Moving to post pandemic investing opportunities**
- Has 2022 been a game changing year for private debt fund managers?
  - Given the interest rate hike, inflation and Fed's tightening stance, have there been preference shifts in tranches? What are the top findings from global investor sentiment?
  - Which strategies are proving resilient or "all weather", regardless of the credit cycle or economic climate?
- Moderator: Alex Lynn, Hong Kong Bureau Chief, **PEI Media**  
Speakers:  
Frank Jordan, Partner, **Crestline Investors**  
Greg Racz, Co-founder and President, **MGG Investment Group**  
David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- 10:00      **Keynote panel: The growth of ESG in private debt markets**
- How has the private debt space responded to the increased emphasis on ESG factors?
  - What are the top ESG priorities – DE&I, climate, data, transparency, other matters?
  - How do managers tackle ESG challenges such as lack of ESG data availability?
  - Is impact investing the next level of ESG in private debt?
- Speakers:  
Jin Suk Choi, Head of Sustainable Investment Team, **Korea Investment Corporation**  
Chantale Pelletier, Global Head of Infrastructure, **Schroders Capital**  
Jeff Pentland, Managing Director, **Northleaf Capital Partners**
- 10:40      *Networking break*
- 11:10      **Keynote presentation**



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11:40

## **Korean investor panel: View from the Top [Korean session]**

- Which developed or emerging markets offer the most potential for returns?
- Will debt overtake bond or equity in short term or long-term portfolio?
- How can the investment team balance the demands for increased yield from the portfolio with risk?
- What attributes do institutional investors look for when choosing cross-border private debt managers?

Moderator: WanSun Park, Head of Alternative Investment Team, **Fubon Hyundai Life Insurance**

Speakers:

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

Byung Kyu Cheon, Chief Investment Officer, **DGB Life Insurance**

12:30

*Networking luncheon*

13:45

## **Panel: The US and Europe market landscape**

- Spotlight on the middle market direct lending in the US and Europe: How has the dynamic evolved in the past year? How did managers tackle challenges such as economic hurdles, the threat of rising interest rates and possible liquidity risks?
- Where do the pockets of opportunities lie when comparing the upper and lower market?
- How are fund managers differentiating themselves in terms of fundraising and portfolio management?

Moderator: Deborah Ogawa, Senior Director, **Fitch Ratings**

Speaker: Antonella Napolitano, Managing Director, **Deerpath Capital Advisors**

14:30

## **Panel: Where do private credit opportunities lie in the new era?**

- What are the drivers and trends for the alternative credit strategies?
- The growth of specialty finance, collateralized loan obligations (CLOs), asset-backed securities (ABS) and niche strategies for opportunistic investors
- Examining the emerging asset classes, sectors, developed vs emerging markets

Speakers:

Ryan Chung, Managing Director and Head of Principal Investment, **Huatai International**

Andre A. Hakkak, Chief Executive Officer and Co-Founder, **White Oak Global Advisors**

15:10

*Networking break*



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- 15:40 **Panel: Uncovering the secret sauce of investment due diligence in South Korea [Korean session]**
- What are new tactics for gatekeepers to deal with Korean investors?
  - What advice would asset managers give to investors who are just entering private debt investment world?
  - What do Korean investors want from fund managers or local placement agents?
- Moderator: Taehyun Yum, Principal, **HarbourVest Partners**
- Speakers:
- Jungik Cho, Head of Alternative Investment Solutions, **Mirae Asset Securities**
- Woong Hwang, Head of Alternative Investments Solution Department, **Kyobo Securities**
- Sunkyung Lee, Managing Director, **PineStreet Asset Management**
- Eugene So, Head of Global Alternative Investment Department, **IBK Securities**
- 16:20 **Panel: On the minds of LP future leaders [Korean session]**
- How do LPs view the private markets developing in 2022-2023?
  - Are there any significant private debt trends and how does these impact return expectations?
  - Where does corporate debt, real estate debt and infrastructure debt sit in LPs' portfolios? Any sectors or strategies that are outperforming expectations?
  - What pieces of advice for those who established themselves in the industry?
- Moderator: Andrew Shin, Head of Investments (Korea), **Willis Towers Watson**
- Speakers:
- Harold Dong Young Kim, Manager, Private Capital Team, **TongYang Life Insurance**
- Rok Kim, Senior Manager, **The Korean Teachers' Credit Union**
- David Yoonsuk Oh, Investment Manager, Alternative team, **National Federation of Fisheries Cooperatives**
- 17:00 *Closing remarks and networking cocktail*



# Japan Korea Week 2022

## PDI Tokyo Forum

Connecting Japan's investors and global private debt leaders

Simultaneous translation between Japanese and English

Thursday 10 November 2022, Shangri-La Tokyo

- 8:00      *Registration and networking breakfast*
- 9:00      *Welcome from PDI and opening remarks*  
*Event chair: Lily Murakami Voukadinov, Partner, Head of Japan Relationship Management and Investor Relations, **Ares Management***
- 9:10      **Opening panel: Private debt into the next decade**
- Why investors continue making private debt commitment despite the prolonged global pandemic, macroeconomic uncertainties, and geopolitical risks?
  - Outlook of the private credit landscape and quality, given the interest rate hike, higher inflation and Fed's tightening stance, etc.
  - Are there any areas of focus that fund managers are excited about for the next 12-18 months?
- Speakers:  
Michael Patterson, Co-found and Global Head of Direct Lending, **HPS**  
Kevin Griffin, CEO & CIO, **MGG Investment Group**  
David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- 9:50      **Keynote panel: The growth of ESG in private debt markets**
- How has the private debt space responded to the increased emphasis on ESG factors?
  - What are the ESG top priorities – DE&I, climate, data, transparency, other matters?
  - Is impact investing the next level of ESG in private debt?
- Moderator: Mari Kogiso, Co CEO, **SDG Impact Japan**  
Speaker: Jeff Pentland, Managing Director, **Northleaf Capital Partners**
- 10:30      *Networking break*
- 11:00      **Keynote presentation**



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[niann.l@peimedia.com](mailto:niann.l@peimedia.com)

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11:40

## Panel: Japanese investor appetite for private debt [Japanese session]

- Where are Japanese investors finding alpha across global markets (developed vs emerging), sectors, asset type (corporate, infrastructure or real estate) and focused strategies in terms of capital structure (senior, junior, unitranche, mezzanine, etc.)?
- What attributes do institutional investors look for when choosing cross-border private debt managers?
- Are there any new approaches or ESG criteria to weather changing environments?

Moderator: Jiro Shimpo, Alternatives Advisory, **Tasku Advisors**

Speakers:

Yuko Hara, Director, Alternative Investments Team, **ORIX Life Insurance**

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

Yoshi Kiguchi, CIO, **Pension Fund of Japanese Corporations**

Eriko Shoji, Director, **Japan Post Bank**

12:30

*Networking luncheon*

13:45

## Panel: The US and Europe market landscape

- Spotlight on the middle market direct lending in the US and Europe: How has the dynamic evolved in the past year? How did managers tackle challenges such as economic hurdles, the threat of rising interest rates and possible liquidity risks?
- Where do the pockets of opportunities lie when comparing the upper and lower market?
- How are fund managers differentiating themselves in terms of fundraising and portfolio management?

Moderator: Deborah Ogawa, Senior Director, **Fitch Ratings**

Speakers:

Frank Jordan, Partner, **Crestline Investors**

Antonella Napolitano, Managing Director, **Deerpath Capital Advisors**

14:25

## Panel: Where do private credit opportunities lie in the new era?

- What are the drivers and trends for the alternative credit strategies?
- The growth of specialty finance, collateralized loan obligations (CLOs), asset-backed securities (ABS) and niche strategies for opportunistic investors
- Examining the emerging asset classes, sectors, and developed vs emerging markets

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

Speaker: Andre A. Hakkak, Chief Executive Officer and Co-Founder, **White Oak Global**

15:05

**Presentation**

15:20

*Networking break*



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15:50

**Panel: Hear from gatekeepers – how should investors balance opportunity and risk when investing in private debt funds? [Japanese session]**

- Lessons learnt from virtual due diligence processes given the lockdown and disruptions. What kind of practices are changed forever?
- How important are transparency and liquidity when the markets become volatile?
- What is the target return and risk acceptable or unacceptable on private debts?
- How are risk assessment, Japanese investors' appetite and activity level changing in response to the economic downturn?

Moderator: Tomoko Kitao, Managing Director, **Hamilton Lane**

Speakers:

Xiaodong (Akina) Chang, Fund Manager, **Tokio Marine Asset Management**

Kunio Kamoi, Senior Product Manager, Fund Research and Development Division, **Mitsubishi UFJ Trust and Banking Corporation**

Manabu Washio, Head, **Aksia Asia**

Keiichi Komori, Managing Director, **DBJ Asset Management**

16:30

**LP Keynote: JST's approach on private debt investing [Japanese session]**

Speaker: Yasuyuki Tomita, Executive Director, Head of Private Equity Investments, **Japan Science and Technology Agency**

17:00

*Closing remarks and networking cocktail*

17:30

**End of the 4<sup>th</sup> annual PDI Japan Korea Week**

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