

Private Debt
Investor

APAC Forum 2022

PDI APAC Forum

13 April 2022, Wednesday | Sofitel Singapore City Centre and virtual UTC+8

The **PDI APAC Forum** is **Asia's leading global debt investing event**. The APAC private credit market has exploded in recent years, buoyed by the momentum caused by some of the world's leading investors' commitments to funds that support the \$4.1tr annual funding gap for Asia's small and medium-sized companies. Asia's private debt markets present some real opportunities in turbulent times and the world is watching! PDI's second annual event for investors and managers will closely examine the Asia opportunity against global private credit markets, bringing industry leaders together directly to discuss opportunities.

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The agenda is subject to change.



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Featured speakers and organisations:

- Kulbhushan Kalia, Head of Private Debt, Asia, Lead – Investment Strategy & Alternatives, Asia, **Allianz Investment Management**
- Valerie Mantot-Groene, Regional Managing Director, Asia Pacific, **Apex Group**
- Omar Dapul, Head of International Solutions, **Allvue**
- Pramod Vijayasankar, Principal Investment Officer, **Asian Infrastructure Investment Bank**
- Sabrina Du, Investment Manager, **AXA China Region Insurance Company**
- Yvonne Siew, Head of Real Estate, Advisory & Investments, **Bank of Singapore**
- Jinglei Chen, Managing Director, **BEI Capital Partners (HK)**
- Jingjing Bai, Advisor, **Bfinance**
- Celia Yan, Co-Head of Asian Private Credit, **BlackRock**
- Joyce Liang, Managing Director and Head of Asia Pacific Credit Research, **BofA Securities**
- Cameron Bunnell, Global Director of Analytics, **Broadridge Financial Solutions**
- Diana Reeves, Director, **Cabot Capital Partners**
- Johnny Adji, Senior Investment Director, **Cambridge Associates Asia**
- Aiva Sperberga, Managing Director, **Campbell Lutyens**
- Marc Bosnyak, Managing Director, **Core Capital Asia**
- Sakshi Abraham, Director, **Credit Suisse**
- Ralf Kind, Managing Director, Head of Real Estate Debt, **Edmond de Rothschild REIM**
- Tom Tull, Former Chief Investment Officer, **Employees Retirement System of Texas**
- Robert Petty, Co-CEO and Co-CIO, **Fiera Capital (Asia)**
- Jeremy Loh, Co-founder and Managing Partner, **Genesis Alternative Ventures**
- Edward Tong, Managing Director, **HPS**
- Muhammad Shahjahan, Head of Debt Services, Asia Pacific, **MUFG Investor Services**
- David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- Ani Deshmukh, Managing Director, **OMERS**
- Nitish Agarwal, Chief Investment Officer, **Orion Capital Asia**
- Akihito Watanabe, Managing Director, **Pierfront Capital**
- James Greenwood, Chief Executive Officer and Partner, **Permira Credit**
- Dong Hun Jang, Former Chief Investment Officer, **POBA**
- Fanda Ho, Head of Investments, **Prudential Hong Kong**
- Innchul Oh, Senior Manager, **Hyundai Marine & Fire Insurance**
- Roger Prinz, Chief Investment Officer, **Silverhorn Group**
- Annie Koh, Professor Emeritus of Finance (Practice), **Singapore Management University**
- Tingting Zhang, Founder, **TerraCotta**
- Jayashree Jena, Associate Director – Private Debt, **TransAsia Private Capital, Singapore**
- Jaideep Lakshminarayanan, Chief Financial Officer, **Trusting Social**
- Dom Beckers, Portfolio Manager, **Victorian Funds Management Corporation**
- Vineet Sukumar, Founder and CEO, **Vivriti Asset Management**



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Wednesday 13 April 2022

08:30 **Registration and arrival break**

09:00 **PDI welcome and opening remarks**

Conference Chair: Valerie Mantot-Groene, Regional Managing Director, Asia Pacific and Interim Country Head - Singapore, **Apex Group**

09:10 **Keynote panel: Global private debt outlook**

- The pandemic has created investing opportunities not seen in over a decade. How have covid-19, pricing, inflation, geopolitical risk and other considerations shaped private debt investment throughout the past two years and in 2022/2023?
- Which private debt strategies will gain most traction over the coming months with investors?
- How do managers see the investment opportunities evolving, are ESG and technology adoption integral parts of it?
- What are the technology trends shaping the industry and how are private debt funds successfully engaging with technology?

Moderator: Sakshi Abraham, Director, **Credit Suisse**

Speakers:

Omar Dapul, Head of International Solutions, **Allvue**

Mark Glengarry, Senior Managing Director, **Blackstone Credit**

Cameron Bunnell, Global Director of Analytics, **Broadridge Financial Solutions**

David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**

Tingting Zhang, Founder, **TerraCotta**

09:55 **Panel: Covid is no obstacle for real estate debt**

- Where do industry leaders see the opportunities in terms of market and sectors?
- How are investors' appetites developing for real estate debt?
- Overview of the future of office and data centres: Are these areas driving real estate debt growth?

Moderator: Yvonne Siew, Head of Real Estate, Advisory & Investments, **Bank of Singapore**

Speakers:

Johnny Adji, Senior Investment Director, **Cambridge Associates Asia**

Ralf Kind, Managing Director, Head of Real Estate Debt, **Edmond de Rothschild REIM**

Robert Petty, Co-CEO and Co-CIO, **Fiera Capital (Asia)**

Akihito Watanabe, Managing Director, **Pierfront Capital**

10:40 Morning break



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- 11:10 **Keynote interview: When East meets West**
Moderator: Jayashree Jena, Associate Director – Private Debt, **TransAsia Private Capital**
Speakers:
Tom Tull, Former Chief Investment Officer, **Employees Retirement System of Texas**
Dong Hun Jang, Former Chief Investment Officer, **POBA**
- 11:50 **[Virtual] Investor Panel: How do investors view opportunities in the private credit markets?**
 - What is driving investors allocations to private credit, and what further appetite shifts can we expect from investors in 2022?
 - Are there any new markets that APAC investors are starting to consider investing in?
 - What are the new norms that private credit investors are expecting to see in the IR manager relationships?Moderator: Sabrina Du, Investment Manager, **AXA China Region Insurance Company**
Speakers:
Pramod Vijayasankar, Principal Investment Officer, Investment Operations, **Asian Infrastructure Investment Bank**
Innchul Oh, Senior Manager, **Hyundai Marine & Fire Insurance**
Fanda Ho, Head of Investments, **Prudential Hong Kong**
Dom Beckers, Portfolio Manager, **Victorian Funds Management Corporation**
- 12:30 Lunch break
- 13:30 **[Virtual] Panel: How China's credit market is changing now**
 - The current situation in China's real estate sector and what investors need to pay attention to with regards to bond defaults
 - How severe would contagion risks be moving forward in public market if more defaults pile up?
 - Will private debt displace public bond allocations in investors' portfolios?Moderator: Jingjing Bai, Advisor, **Bfinance**
Speakers:
Joyce Liang, Managing Director and Head of Asia Pacific Credit Research, **BofA Securities**
Jinglei Chen, Managing Director, **BEI Capital Partners (HK)**
Marc Bosnyak, Managing Director, **Core Capital Asia**
- 14:10 **Fireside chat: What's next for Asia private debt?**
Moderator: Diana Reeves, Director, **Cabot Capital Partners**
Speakers:
Nitish Agarwal, Chief Investment Officer, **Orion Capital Asia**
Ani Deshmukh, Managing Director, **Ontario Municipal Employees Retirement System**



- 14:40 **Presentation: The Indian Performing Credit Opportunity**
- The performing credit opportunity in India
 - The role of technology in tapping into the opportunity
 - The multiplier impact effect that takes place as a result of investing in the space
- Speaker: Vineet Sukumar, Founder and CEO, **Vivriti Asset Management**
- 15:05 Afternoon break
- 15:25 **[Virtual] Presentation: European middle market direct lending**
- Outlook of the European middle market – developed vs emerging markets
 - How has the competitive landscape evolved in the past year?
 - How has the direct lender changed the investment practices in response to the new insights gained and risks faced?
- Speaker: James Greenwood, Chief Executive Officer and Partner, **Permira Credit**
- 15:50 **South-East Asia venture debt - Overview, trends and how it works**
- GP: What is the outlook for South-East Asia venture debt?
 - LP: What should investors look out for in the year ahead?
 - Entrepreneur: How is venture debt fitting into their business model?
- Moderator: Annie Koh, Professor Emeritus of Finance (Practice), Senior Advisor, Business Families Institute, **Singapore Management University**
- Speakers: Jeremy Loh, Co-founder and Managing Partner, **Genesis Alternative Ventures**
Roger Prinz, Chief Investment Officer, **Silverhorn Group**
Jaideep Lakshminarayanan, Chief Financial Officer, **Trusting Social**
- 16:20 **Keynote Panel: Spotlight on private debt in Asia-Pacific**
- What are some of the misconceptions that Asian investors may have had about the private debt in the past and how has that changed over time?
 - What makes APAC private debt a more compelling opportunity than other asset classes?
 - How do managers tackle these challenges in Asia: weaker legal frameworks, fx exposure and complexity in deal execution?
- Moderator: Aiva Sperberga, Managing Director, **Campbell Lutyens**
- Speakers:
Kulbhushan Kalia, Head of Private Debt, Asia, Lead – Investment Strategy & Alternatives, Asia, **Allianz Investment Management**
Celia Yan, Co-Head of Asian Private Credit, **BlackRock**
Edward Tong, Managing Director, **HPS**
Muhammad Shahjahan, Head of Debt Services, Asia Pacific, **MUFG Investor Services**
- 17:00 **Chair's closing remarks**



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