

Seoul Forum

Japan Korea Week 2022



Thursday 16th June (Times in KST/JST) Seoul
Live Sessions with Korean Investors Simultaneous translation in Korean and English

0900 Keynote Presentation

Chairperson: John Walker, Executive Chairman, **Eastpoint Partners**

Speaker: Brad Kim, Managing Director, **Stonepeak Infrastructure**

0930 Keynote Panel: Infrastructure Investing strategies for the future

- Which sectors and strategies present the best potential for future growth? How should investors prepare and consolidate their portfolios?
- Mitigating future risks such as climate change risk – what actions need to be taken now?
- Energy in transition 2.0 - investing beyond solar and wind

Moderator: Tharshini Ashokan, Reporter, **Infrastructure Investor**

Speakers: Andreas Huber, Vice Chairman Asia Pacific, **EQT**

Jay Kim, Investment Director, Infrastructure, **IFM Investors**

Steven Pugh, Partner, **Federated Hermes**

Ayaka Fujiwara, Climate Investment Specialist, **Green Climate Fund**

Yusun Chung, Director, Private Assets, **Schroders**

1020 Break

1050 Panel: Understanding the diversifying infrastructure fund landscape

- What opportunities in midcap infra and other sectors are being overlooked?
- The emergence of social infrastructure as a subsector
- The energy transition – looking beyond conventional renewables asset classes

Moderator: Ana Romero, Co-Founder, **Green Transition Partners**

Speakers: Gwenola Chambon, CEO, **Vauban Infrastructure Partners**

Simon Soder, Partner, **Antin Infrastructure Partners**

Sam Lissner, Principal, **Ridgewood Infrastructure**

Philip Kent, Director, **Gravis Capital**

Manish Taneja, Deputy Global Head, Infrastructure Credit, **Carlyle Group**

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1140 Presentation: Building Resilient Infrastructure Portfolios Today – How?

Speaker: Ross Israel, Global Head of Infrastructure, **QIC**

1210 Lunch & Networking

1320 Panel: Debt strategies for Korean insurers

- Does appetite remain high amongst Korean investors? What drives their investment?
- How resilient has infrastructure debt been proven post pandemic?
- ESG considerations for the debt portfolio

Moderator: Dong Hun Jang, Senior Advisor, **Yulchon**

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

Scott Lawrence, Partner, **Glennmont Partners**

Jungmin Lim, Director, **NH Investment & Securities**

1410 Panel: Digital & Renewables: Infrastructure's hottest markets?

- Convergence between energy and digital transition - data centres and energy demand
- Top subsectors and geographies to consider
- How concerned should LPs be about overheating in these sectors?

Moderator: Woo-song Jung, Managing Director, **KTB Asset Management**

Speakers: Jansen Ang, Senior Investment Leader, Private Infrastructure Asia, **Partners Group**

Steven Dowd, CIO, Private Infrastructure Strategies, **CBRE Investment Management**

Dylan Foo, Partner, Co-Head of Infrastructure, **Apollo**

Edward Winter, Managing Director, Global Infrastructure - Energy & Power, **BlackRock**

1500 Break

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1530 Panel: ESG considerations for the infrastructure portfolio

- What progress is the infra asset class making on ESG?
- Does investing behind the 'E' enhance performance?
- Understanding best practices for Korean LPs to adopt ESG principles in their investments

Moderator: Kwang Kim, Country Representative, **Asia Foundation**

Speakers: Jenny Koh, Founder, **3I Advisory**

Jeff Pentland, Managing Director, **Northleaf Capital Partners**

Regina Chung, First Vice President, Global Partners Group, **CIM**

Richard Knight, Managing Director, Asset Management, **Equitix**

1615 Panel: Korean LPs appetite for infrastructure

- Understanding appetite for comingled funds vs co-investments
- Do LPs have concerns over style drift with their GPs?
- Are Korean investors moving into more value-add investing strategies?

Moderator: Andrew Shin, Senior Investment Consultant, **Willis Towers Watson**

Speakers: Jake Lee, Head of Infrastructure, **Hyundai Insurance**

Seok Won Lee, Investment Manager, **POBA**

Dong Young Kim, Private Capital Team, **TongYang Life Insurance**

1700 Cocktail Reception

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