

# Tokyo Forum

## Japan Korea Week 2022

**Tuesday 14<sup>th</sup> June (Times in KST/JST) Shangri La Hotel, Tokyo**  
**Live Sessions with Japanese Investors. Simultaneous translation in Japanese and English**

### 0800 Breakfast Briefing

#### 0900 Keynote Fireside Chat:

**Speaker:** Tadasu Matsuo, Managing Director, Head of Global Alternative Investments, **Japan Science & Technology Agency (JST)**

**Interviewer:** Jamie Miyazaki, **Tessier Ashpool Research**

#### 0930 Keynote Panel: Next generation infrastructure investing strategies

- 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?
- ESG and Impact as the nexus of future infrastructure investing

**Moderator:** Alexander Wellsted, Principal Evaluation Specialist, **Asian Development Bank**

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

Mounir Corm, Deputy CEO, **Vauban Infrastructure Partners**

Fabian Gröne, Partner, **EQT**

Erik Savi, Global Head of Carlyle Infrastructure Credit, **Carlyle Group**

### 1020 Break

### **1050 Panel: The evolution of infrastructure fund strategies – implications for investors**

- Specialist vs Generalist funds – which works best for the Japanese investor?
- Core infrastructure – will it remain an integral part of the infrastructure portfolio?
- Are we seeing a greater increase in mid-cap strategies as core becomes saturated from funds?

**Moderator:** Yuriy Humber, President, **Yuri Group**

**Speakers:** Philip Kent, Director, **Gravis Capitak**  
Jun Ohashi, Partner, Head of **Actis Japan**  
Yasuhiro Ono, Director, **Stonepeak**

### **1140 Presentation: Building Resilient Infrastructure Portfolios Today – How?**

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

### **1210 Lunch & Networking**

### **1310 Panel: Equity or Debt? Getting the right portfolio balance for the Japanese LP**

- How have infra debt portfolios been performing post Covid?
- Does debt provide the Japanese investor sufficient yield vis a vis equity?
- Understanding the role of ESG in constructing the debt portfolio

**Moderator:** Yasu Furusawa, Deputy General Manager, **Oriental Consultants Global**

**Speakers:** Shuji Hatsukaiwa, Head of Alternatives Sales & Product, **Schroders**  
Mikio Iida, Associate General Manager, **Sumitomo Mitsui Trust Bank**  
Wataru Kawabata, Managing Director, **DBJ Asset Management**

### **1400 Presentation: The Evolving Infrastructure Investment Universe**

- The potential disruptive impact of Net Zero, climate emergency and energy transition
- Understanding the shifting risk pattern associated with geo-political and macro-economic developments
- The growing significance of “S” in ESG in developed markets, and consequential importance of high-quality asset management

**Speaker:** Perry Noble, Head of Infrastructure, **Federated Hermes**

For programme information:  
**Andrew Wolff**  
[andrew.w@peimedia.com](mailto:andrew.w@peimedia.com)

For sponsorship opportunities:  
**James Baker**  
[james.b@peimedia.com](mailto:james.b@peimedia.com)

### 1430 Panel: Embracing the energy and digital transitions

- Understanding the convergence of digital and energy in transition investing opportunities
- Will competition in the sectors lead to increasing stratification in returns?
- Technology risks and what it means for the sectors

**Moderator:** Kanna Mihara, Associate Director, **Macquarie Capital**

**Speakers:** Joost Bergsma, CEO Managing Partner, **Glennmont Partners**  
Steven Dowd, CIO, Private Infrastructure Strategies, **CBRE Investment Management**  
Dylan Foo, Partner, Co-Head of Infrastructure, **Apollo**  
Kok Leong Toh, Senior Investment Leader, Private Infrastructure, **Partners Group**,  
Edward Winter, Managing Director, Global Infrastructure - Energy & Power, **BlackRock**

### 1520 Break

### 1550 Panel: Seeking sustainability in the infrastructure portfolio

- How to efficiently track ESG performance in the infra portfolio
- Are both seeking sustainability and high returns compatible?
- Avoiding greenwashing what should Japanese LPs know?

**Moderator:** Atsunori Yamaura, Director, **Russell Investments**

**Speakers:** Ryuichi Horie, Co-founder and Chief Executive Officer, **CSR Design Green Investment Advisory**  
Akihito Nagata, Chief Portfolio Manager, Alternative & Fund Investment, **Nissay Asset Management Corporation**  
Jeff Pentland, Managing Director, **Northleaf Capital Partners**

### 1635 Panel: Gauging LP appetite in the asset class

- Does LP appetite remain risk averse or are they moving up the risk curve?
- Do Japanese LPs prefer specialists or generalist fund managers?
- Would LPs consider first time funds or is a strong track record a prerequisite to selection?

**Moderator:** Takako Koizumi, Executive Director, **Mitsui & Co Alternative Investments**

**Speakers:** Jun Ohata, Senior Product Manager, **Mitsubishi UFJ Trust and Banking**  
Tatsuya Otsubo, Manager, **Norinchukin Bank**  
Koji Someno, Manager, Alternative Investment Department, **Dai-ichi Life Insurance Company**  
Yuriko Watanabe, Director, **Japan Post Bank**

### 1725 Cocktail Reception

For programme information:  
**Andrew Wolff**  
[andrew.w@peimedia.com](mailto:andrew.w@peimedia.com)

For sponsorship opportunities:  
**James Baker**  
[james.b@peimedia.com](mailto:james.b@peimedia.com)