

PERE

# Global Investor Forum: Tokyo 2022



## PERE Global Investor Forum: Tokyo

13th September 2022 | Shangri La Hotel, Tokyo

## Local capital, global opportunities

### Principal sponsor

KKR

### Supporting association



### 2022 speakers include:

1. Hideto Yamada, Head of Global Real Estate, GPIF
2. James Haines, General Manager and Head of Global Real Estate Structured Debt, Aozora Bank
3. Atsushi Miura, Managing Director, Blackstone
4. Steven Bass, Founder & CEO AR Capital Advisors
5. Simon Treacy, CEO, Private Equity Real Estate, CapitaLand Investment
6. Tetsuya Fujita, Managing Director, CBRE Investment Management
7. Oh Iwata, Deputy Director, Real Estate Finance Department, Development Bank of Japan
8. Brad Dockser, Founder & CEO, Green Generation
9. Ken Sugimoto, Representative Director, Head of Office, Japan, GIC (Japan)
10. John Pattar, Partner & Head of Real Estate Asia, KKR
11. Dan Dubrowski, Co-Founder & Head of Capital Formation, Lionstone Investments
12. Kiyosei Sugioka, MD, Head of Alternative Investments, Orix Life Insurance
13. Christie Ou, Senior Reporter, PERE
14. Koiji Sugauchi, CIO, Osaka Shoko Shinkin Bank
15. Hideki Yano, President, Sumisho Realty Management
16. Atsunori Yamaura, Director, Russell Investments
17. Akihisa Hoshino, Associate General Manager, Alternative Assets Investment Dep., Sumitomo Mitsui Trust Bank
18. Ken Aoyama, CEO, Samurai Capital
19. Satoshi Saito, Head of Overseas Property Investment, Tokio Marine Asset Management
20. Shinji Kawano, General Manager, Alternative Investment Group, Tokio Marine & Nichido Fire Insurance



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Tuesday 13th September 2022 Tokyo (All times are based on JST/UTC+9)

0830 **Registration and coffee**

0900 **Keynote Panel: Post Pandemic real estate strategies**

- Assessing asset resilience post pandemic. Which sectors have performed well? Which haven't?
- Are we seeing paradigm shifts in investing strategies?
- Post pandemic threats, opportunities and mitigating geopolitical risk

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

**Speakers: Hideto Yamada, Head of Global Real Estate, GPIF, John Pattar, Partner & Head of Real Estate Asia, KKR, Dan Dubrowski, Co-Founder & Head of Capital Formation, Lionstone Investments**

0950 **Keynote Presentation**

**Speaker: KKR, TBC**

1020 **Panel: Japan as the top destination for Asian real estate**

- Tokyo office markets – are we seeing a strong rebound?
- Logistics – is pricing in Japan now too high or do they remain attractive assets to buy?
- What is the future of multifamily? Can you gain more scale in the subsector in Japan?

**Speakers: Atsushi Miura, Managing Director, Blackstone, Simon Treacy, CEO, Private Equity Real Estate, CapitaLand Investment, Ken Sugimoto, Representative Director, Head of Office, Japan, GIC (Japan)**

1110 **Break**

1140 **Panel: Investing in new real estate asset classes**

- Senior housing – a booming sector in developed markets?
- Data centres as a hybrid infra/real estate investing strategy
- Student housing – making a strong comeback post covid?

**Moderator: Steven Bass, Founder & CEO AR Capital Advisors**

1225 **Presentation: TBC**

1300 **Lunch**



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1400 **Panel: Working successfully with Japanese gatekeepers**

- Understanding the do's and don't's for pitching LPs
- Understanding the role of the gatekeeper in Japan
- Building GP/Gatekeeper relationships

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

**Speakers: Akihisa Hoshino, Associate General Manager, Alternative Assets Investment Dep., Sumitomo Mitsui Trust Bank, Satoshi Saito, Head of Overseas Property Investment, Tokio Marine Asset Management**

1445 **Panel: The rising role of ESG and sustainability in real estate**

- How to efficiently track ESG performance in real estate investments
- Seeking sustainability and high returns in the asset class – is it possible?
- Strategies for decarbonizing the portfolio

**Speakers: Brad Dockser, Founder & CEO, Green Generation, Hideki Yano, President, Sumisho Realty Management, Ken Aoyama, CEO, Samurai Capital**

1530 **Break**

1600 **Panel: Investing in real estate debt**

- Understanding the post pandemic debt investing landscape
- Which sectors are proving most attractive to lenders? Have we seen a shift?
- Evolution of debt strategies: are we seeing more separate accounts and co-investment appetite?

**Speakers: James Haines, General Manager and Head of Global Real Estate Structured Debt, Aozora Bank**

1640 **Panel: Japan's LPs – how does real estate fit within their private market's strategy?**

- How do LPs currently view Real Estate compared to other alternative asset classes?
- Is appetite increasing post pandemic?
- Risk appetites amongst investors – are higher risk strategies being considered?

**Moderator: Tetsuya Fujita, Managing Director, CBRE Investment Management**

**Speakers: Oh Iwata, Deputy Director, Real Estate Finance Department, Development Bank of Japan, Kiyosei Sugioka, MD, Head of Alternative Investments, Orix Life Insurance, Koiji Sugauchi, CIO, Osaka Shoko Shinkin Bank, Shinji Kawano, General Manager, Alternative Investment Group, Tokio Marine & Nichido Fire Insurance**

1720 **Close of Forum**



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