

PERE

Global Investor Forum: Tokyo 2022



PERE Global Investor Forum: Tokyo
13th September 2022 | Shangri La Hotel, Tokyo

Understand Japanese investor needs at the **PERE Global Investor Forum: Tokyo** on 13 September. Expand your network, gain actionable insight, and escalate your fundraising potential by connecting with global real estate's most active private real estate investors and managers.

Determine the direction of outbound capital flows as we gather the biggest domestic investors, global fund and asset managers and strategic partners shaping the future of real estate investing.

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Programme

13 September 2022 | All times are based on JST/UTC+9

Simultaneous translation between Japanese and English

0800 Registration and networking

0815 Invitation only: Japan investor exchange (closed door roundtable)

Fund management selection – conducting your due diligence

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

David Cheong, Managing Director, KKR

Dan Dubrowski, Co-Founder & Head of Capital Formation, Lionstone Investments / Columbia Threadneedle

Michael Regan, Managing Director, Investments, CIM Group

Matthew Kaplan, Head of Almanac, Managing Director, Almanac Realty Investors

0950 Keynote Session: KKR's approach to Asia and Japan real estate

- Asia Pacific real estate strategies in the private market
- Japan private real estate strategies (themes, platforms, etc.)
- Japan public market real estate strategies through KJRM

Moderator: Masamu Kakinoki, Client & Partner Group, KKR

Speakers: David Cheong, Managing Director, KKR

Kensuke Kudo, Director & David Cheong, Managing Director, KKR

1020 Networking coffee break

1050 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?



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Moderator: Katsuyuki Tokushima, Head of Pension Research and ESG Development, NLI Research Institute

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)
Hidetoshi Ono, Country Head – Japan, Tsao Family Office

1135 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?
- Manufactured housing – a growing niche in alternative real estate sectors

Moderator: Steven Bass, Senior Director, Portfolio Manager, Alternatives and Strategic Transactions, Nuveen Real Estate

Speakers: Bob McClain, CEO, Crow Holdings Capital

Toshiyuki Fujii, General Manager, Investment Business Department, Mori Trust

Speaker, PIMCO

1220 Networking lunch break

1330 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 Funds Investment Dept, Sumitomo Mitsui Trust Bank

Takako Tokinaga, Portfolio Manager, Mitsubishi UFJ Trust Bank

Satoshi Saito, Head of Overseas Property Investment, Tokio Marine Asset Management

1415 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

Moderator: Ryuichi Horie, Co-Founder & CEO, CSR Design Green Investment Advisory

Speakers: Brad Dockser, Founder & CEO, Green Generation

Hideki Yano, President, Sumisho Realty Management

Ken Aoyama, CEO, Samurai Capital

Satoshi Ikeda, Chief Sustainable Finance Officer, Financial Services Agency

1500 Networking coffee break



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1530 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?

Moderator: Joyce Lo, Director, Private Capital Advisory, Lazard

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

Lennart van Mierlo, Head of Commercial Real Estate Debt, NNIP

Shai Greenberg, Senior Vice President, Genkai Capital Management

1615 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: Ayaka Takimoto, Head of Real Estate and Infrastructure Investments, Japan Science and Technology Agency (JST)

Kiyosei Sugioka, MD, Head of Alternative Investments, Orix Life Insurance

Koji Sugauchi, CIO, Osaka Shoko Shinkin Bank

Shinji Kawano, General Manager, Alternative Investment Group, Tokio Marine & Nichido Fire Insurance

1700 Networking cocktails and end of conference



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