

PERE

Global Investor Forum: Tokyo 2022



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

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Speakers include:

- 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**
- Atsushi Miura, Managing Director, **Blackstone**
- Simon Treacy, CEO, Private Equity Real Estate, **CapitaLand Investment**
- Ken Sugimoto, Representative Director, Head of Office, Japan, **GIC (Japan)**
- Steven Bass, Founder & CEO, **AR Capital Advisors**
- Bob McClain, CEO, **Crow Holdings Capital**



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- Atsunori Yamaura, Director, **Russell Investments**
- Akihisa Hoshino, Associate General Manager, Alternative Assets 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**
- Brad Dockser, Founder & CEO, **Green Generation**
- Hideki Yano, President, **Sumisho Realty Management**
- Ken Aoyama, CEO, **Samurai Capital**
- James Haines, General Manager and Head of Global Real Estate Structured Debt, **Aozora Bank**
- Tetsuya Fujita, Managing Director, **CBRE Investment Management**
- Oh Iwata, Deputy Director, Real Estate Finance Department, **Development Bank of Japan**
- 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**
- Koiji Sugauchi, CIO, **Osaka Shoko Shinkin Bank**
- Shinji Kawano, General Manager, Alternative Investment Group, **Tokio Marine & Nichido Fire Insurance**

Programme

13 September 2022 | All times are based on JST/UTC+9
Simultaneous translation between Japanese and English

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**

David Cheong, Managing Director, **KKR**

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

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

Speaker: KKR, TBC



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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**
Speakers: Bob McClain, CEO, **Crow Holdings Capital**

1225 **Presentation: TBC**

1300 **Lunch**

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 Dept, **Sumitomo Mitsui Trust Bank**
Takako Tokinaga, Portfolio Manager, **Mitsubishi UFJ 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**



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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**

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**

Koiji Sugauchi, CIO, **Osaka Shoko Shinkin Bank**

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

1730 **Close of Forum**



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