

Private Equity
International

Responsible Investment Forum New York 2024

February 20 - 21

PEI Responsible Investment Forum: New York 2024 Agenda

20 - 21 February 2024 | New York

Driving returns through sustainability

Day One: 20 February

7:45

GP Sponsored Breakfast briefings
LP ILPA Breakfast Briefing

8:30

Introduction from PEI & PRI

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8:35

Chairpersons opening remarks

08:45

Global perspectives on sustainability in U.S. Private Equity

- Assessing the extent to which the ESG backlash has shaped advancements in sustainability within U.S. private equity
- Investigating how the Inflation Reduction Act has redefined the landscape of sustainable practices and investment decisions
- Evaluating the position of the U.S. Compared to Europe: is the gap narrowing or widening?
- Delving into the viewpoints of U.S. GPs regarding the adoption and implementation of net-zero targets

09:25

Practical tips for how heads of sustainability should be engaging with their investment teams

- Strategic alignment and impactful collaboration
- Communicating effectively to bridge the gap with the investment team
- Incorporating ESG into due diligence and throughout the investment cycle
- Collaborate with and learn from investment teams: examples of what works

10:05

EDCI Showcase: presentation and analysis of latest findings

- Investigating the correlation between hold periods and the level of sustainability impact
- Spotlight on findings in different areas of sustainability, e.g. social, climate, renewables etc
- Where to next for the initiative?

10:45

EDCI Tech case study: Integrating tech into sustainability strategy

11:05

Coffee & networking

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11:40

To what extent does ESG drive portfolio value creation

- How do sustainability strategies increase profitability and sell-on value
- Showing the value of ESG work: can this be used to fight the backlash?
- To what extent does implementing sustainability increase resilience?
- Case studies from real private equity investments

12:20

Fostering inclusion and diversity: insights, challenges, and best practices

- Overcoming barriers to making progress on DEI
- What could recent supreme court judgements mean for businesses DEI strategies?
- The importance of operationalising DEI and taking out the controversy
- Case studies of what works well

Johnathan Medina, Global Head of DE&I, Macquarie Asset Management

13:00

Climate case study: how a leading manager is addressing climate strategy

13:20

Lunch

<u>Track A</u> <u>IMPACT INVESTING</u>	<u>Track B</u> <u>TECH & DATA</u>	<u>Track C</u> <u>REGULATION</u>	<u>Track D</u> <u>ANY OTHER BUSINESS</u>
14:15 Landscape of impact investing: emerging managers, fundraising and returns	14:15 Fostering collaboration between sustainability and tech teams <ul style="list-style-type: none">• How do/should ESG and digital teams intersect? How can they all drive value for the deal team?	14:15 SEC update on climate disclosure rule <ul style="list-style-type: none">• Assessing the implications for assessment, reporting and transparency	14:15 Driving diversity at portfolio companies <ul style="list-style-type: none">• Promoting diverse leadership across your portfolio

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<ul style="list-style-type: none"> • Which investment themes are taking off in the impact market? • Which investment propositions are resonating most with impact allocators? • How are first-time and emerging managers approaching fundraising? 	<ul style="list-style-type: none"> • Crafting strategic alliances: navigating IT and Tech collaborations • Comparing approaches from large firms to the mid-market 	<ul style="list-style-type: none"> • Providing clear and consistent climate-related information to LPs • Where next for US regulators? 	<ul style="list-style-type: none"> • Overcoming barriers to diversity and inclusion in portfolio businesses • Fostering inclusivity to drive innovation and performance • Measuring Progress: tracking and reporting on diversity advancement
<p>15:00 Delivering real world change: doing impact investing like you mean it</p> <ul style="list-style-type: none"> • What are some of the best practices in executing a credible impact creation plan? • Are we seeing a link between greater impact and higher valuations of assets? • How are funds engaging their portfolio companies to deliver on impact performance? • 	<p>14:55 Assessing what AI could mean for the sustainability role</p> <ul style="list-style-type: none"> • Exploring AI's potential to streamline ESG assessments during due diligence • Leveraging AI across the whole investment cycle • Assessing how AI could aid in managing and enhancing ESG performance across investments 	<p>14:55 Navigating changing regulations as a global investor</p> <ul style="list-style-type: none"> • Double materiality not accepted in US like Europe • Divergence politically between US and rest of the world: • How will antitrust laws impact cross-border M&A? <p>Sheryl Schwartz, Chief Investment Officer, ALTI</p>	<p>14:55 Revolutionary approaches to Decarbonization</p> <ul style="list-style-type: none"> • What does best practice look like when decarbonizing a portfolio company? • Addressing the financial shortfall in decarbonization Initiatives • An exploration of emerging and innovative investment strategies
<p>14:45 Impact in decarbonization and climate investing</p> <ul style="list-style-type: none"> • What investment opportunities has the IRA legislation enabled? 	<p>15:45 Moving from data accumulation to data utilization</p> <ul style="list-style-type: none"> • Understanding the limitations of relying solely on portfolio company data 	<p>15:45 Navigating antitrust laws in the context of the energy transition</p> <ul style="list-style-type: none"> • How can companies work together effectively while staying compliant with antitrust laws? 	<p>15:45 Defining what is meant by stewardship for private equity</p> <ul style="list-style-type: none"> • How does stewardship apply to private equity investing?

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<ul style="list-style-type: none"> • Which types of assets are promising to deliver carbon abatement and sequestration? • How are funds measuring their climate impact? 	<p>and delving into broader ESG metrics</p> <ul style="list-style-type: none"> • Fostering effective collaboration between private equity firms and lenders to share ESG data • Exploring strategies to effectively convey ESG data between different stakeholders 	<ul style="list-style-type: none"> • Exploring litigation risk around energy transition investments • Analysing the increased scrutiny on M&A: how are regulators evaluating antitrust concerns? 	<ul style="list-style-type: none"> • Fiduciary duty vs stewardship: is there tension between them? • What are the responsibilities of private equity managers in terms of stewardship
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16:40

Coffee & networking

17:00

Working Group Series A

This session will allow GPs and LPs in the audience to join an interactive roundtable discussion with designated facilitators

<u>Working Group A</u> Integrating tech and sustainability	<u>Working Group B</u> Dealing with regulations	<u>Working Group C</u> Making yourself effective within the firm	<u>Working Group D</u> Working with portfolio companies	<u>Working Group E</u> Making a plan for DEI across the portfolio	<u>Working Group F</u> Advancing your career in private equity
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17:45

Close of day one of conference followed by cocktail reception

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Day Two: 21 February

8:00-8:50

Invitation only **Breakfast Briefings** for LPs and GPs

- **Recruiter GP briefing** - Appropriate structuring of Sustainability teams + trends for ESG talent
- **LP data discussion**

8:55

Opening Remarks

9:00

Building a long-term vision for ESG data

- Being more strategic about data collection: to what extent is it possible when GPs collect what LPs ask?
- Analysing what data is being used for: can GPs and LPs work together?
- Evaluating the role of third-party ESG assessments in complementing internal data
- To what extent can data be used to prove to LPs that ESG adds value to investments?

9:40

The big debate: how can private equity deal with the ESG backlash in a proactive and positive way

10:20

Ownership Works: why employee ownership is catching on in private equity

- An update on who is signed up to the initiative
- The advantages of aligning incentives between employees and management
- Why ownership cultivates a focus on long-term strategic growth
- Case studies from private equity where ownership is working

11:00

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11:30

Supply chain sustainability and human rights

- Which issues are funds focusing on when it comes to supply chain ESG risks at their portfolio companies?
- Considering the latest regulatory landscape in North America
- Working with portfolio companies to deliver more resilient supply chains
- Showcasing successful case studies that show how you can drive positive change

12:05

Making biodiversity and natural capital relevant to private equity investing

- TNFD V4.0: what does it mean for investors?
- Leveraging biodiversity data in investment decisions
- To what extent does work on biodiversity interlink with climate strategy?
- Where and how can private equity fund managers incorporate natural capital solutions in their investment strategy?

12:45

ESG recruitment Survey Presentation

This unique presentation will highlight the findings of a recent survey around sustainability in private equity in the U.S. and globally. Topics to include how teams are being structured, where are people finding talent, how are people being remunerated and much more

13:15

Lunch

14:00 Working Group A Building a plan for biodiversity	14:00 Working Group B Voluntary carbon markets	14:00 Working Group C Integrating AI into sustainability	16:45 Working Group D TBC
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15:00

Close of conference

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