

# Women in Private Markets Summit London 2024

## Women in Private Markets Summit

4 - 5 December 2024 | 133 Houndsditch, London

*The world's leading investment event for women in alternatives*

### Day One:

4 December

08:00-09:00

**Coffee & registration and meet and greet networking activity**

09:10

**Chairs opening address**

**Laurie Mahon**, Senior Advisor, **Infrastructure Markets**

09:15

**Keynote interview: The Future of London as a Global Financial Centre**

**Catherine McGuinness CBE CC**, Past Chair, **City of London's Policy & Resources Committee**

9:45

**Diversity dialogue: the role of senior leaders in driving systemic change**

- Strategies for benchmarking gender diversity progress and establishing meaningful metrics
- How can you eliminate unconscious bias in your diversity and inclusion initiatives?
- Exploring the impact of mentorship and sponsorship programs and what works well
- Tips for success in private markets

**James Brocklebank**, Managing Partner, **Advent International**

10:25

**State of the union: investor sentiment in the current environment**

- Is the environment for fundraising, deals and exits improving?
- Sectors and strategies that have prospered in a more challenging environment
- What new types of liquidity options are managers utilising?
- Exploring reasons for optimism for the next year

**Teia Merring**, Senior Investment Director, **USS**

**Aoifinn Devitt**, Chief Investment Officer, **London LGPS**

11:15

**Networking Break**

Specific areas for networking

For program information:

**Charles Gould**

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<p>Infrastructure Investor</p> <p><b>Women in Infrastructure Forum</b> London 2024</p>	<p>Private Equity International</p> <p><b>Women in Private Equity Forum</b> London 2024</p>	<p>PERE</p> <p><b>Women in Real Estate Forum</b> London 2024</p>	<p>Private Debt Investor</p> <p><b>Women in Private Debt Forum</b> London 2024</p>
<p>12:00</p> <p><b>The state of play in infrastructure: prospering in a more challenging environment</b></p> <ul style="list-style-type: none"> <li>- Why will infrastructure prove a safe and enticing haven for investors in a challenging investment environment?</li> <li>- What does recent consolidation mean for the asset class? Is this a sign of things to come?</li> <li>- What is the next frontier for infrastructure?</li> </ul> <p>Moderator: <b>Amy Mahon</b>, Partner, Global Co-Head of Energy and Infrastructure, <b>Simpson Thacher &amp; Bartlett</b> <b>Gwenola Chambon</b>, CEO-Managing Partner, <b>Vauban Infrastructure Partners</b></p>	<p>12:00</p> <p><b>The state of play in private equity: finding opportunities in today's market</b></p> <ul style="list-style-type: none"> <li>- Identifying emerging sectors and geographic regions with promising growth potential</li> <li>- How are managers leveraging technology and data analytics to drive returns?</li> <li>- Discussion around market innovations that managers are employing</li> </ul> <p>Moderator: <b>Mirja Lehmler-Brown</b>, Partner, <b>Hayfin</b></p>	<p>12:00</p> <p><b>The state of play in real estate: outlining the top strategic priorities in today's market</b></p> <ul style="list-style-type: none"> <li>- How to tackle the 2-trillion wall in global real estate debt</li> <li>- Finding opportunities amid a profound shift in the real estate landscape</li> <li>- Assessing the most attractive markets and investment strategies in Europe and beyond</li> </ul> <p>Moderator: <b>Isabel Berger</b>, Partner, <b>Gibson Dunn</b></p>	<p>12:00</p> <p><b>The state of play in private debt: Evaluating the through-the-cycle value of the asset class</b></p> <ul style="list-style-type: none"> <li>- Where are we now in the cycle?</li> <li>- With the higher rates what is the impact on borrower appetite- is there enough dealflow?</li> <li>- How long will the "golden era" of private credit continue?</li> </ul>
<p>12:40</p> <p><b>Exploring the potential and roadblocks in digital infrastructure investments</b></p> <ul style="list-style-type: none"> <li>- How digital infrastructure is faring in the high inflation and interest rates era</li> <li>- Navigating the roadmap for sustainable digital infrastructure</li> <li>- What's next for digital infrastructure?</li> </ul>	<p>12:40</p> <p><b>Exploring deal dynamics in the European PE market</b></p> <ul style="list-style-type: none"> <li>- Are valuations still too high?</li> <li>- Evaluating whether dealmaking activities are showing signs of recovery</li> <li>- Identifying hotspots and areas of opportunity</li> </ul>	<p>12:40</p> <p><b>Investing in alternative real estate strategies including data centres, healthcare, student housing and more</b></p> <ul style="list-style-type: none"> <li>- What is driving increased investor interest in non-traditional sectors?</li> <li>- Understanding the unique risks associated with investing in alternative real estate strategies and how investors mitigate them</li> <li>- Identifying operational considerations and potential value creation</li> </ul>	<p>12:40</p> <p><b>Opportunities for investors in real asset debt</b></p> <ul style="list-style-type: none"> <li>- Is the macro environment pushing investors to diversify their allocation into private infrastructure and real estate credit which has a lower correlation and different cycle?</li> <li>- What comparative advantages does the private real estate debt market present in contrast to other sectors</li> </ul>

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		opportunities within alternative sectors	of corporate credit investment? - How are managers navigating regulatory frameworks and pressures?
13:15 <b>Lunch</b>			
14:15 <b>Investor perspectives on the infrastructure asset class</b> <ul style="list-style-type: none"> <li>- Exploring the demand for more complex structure deals</li> <li>- How infrastructure investors plan to tackle the tailwinds from the increase in interest rates</li> <li>- Looking into a crystal ball: the future for investor-manager relationships</li> </ul> <b>Katya Romashkan</b> , Aware Super Portfolio Manager - Infrastructure, <b>Aware Super</b>	14:15 <b>Investor Panel: Allocating to private equity during uncertain times</b> <ul style="list-style-type: none"> <li>- Strategies for mitigating risk and optimizing returns in volatile market conditions</li> <li>- How are investors dealing with overallocation issues, rising interest rates and other challenges?</li> <li>- Investor views on innovations managers are implementing</li> </ul> <b>Jenny Newmarch</b> , Head of Private Equity, <b>Aware Super</b> <b>Nathalie Chollet</b> , Head of Circular Economy & Industrial Resilience   Equity Investments, <b>European Investment Fund</b> <b>Rachel Farrell</b> , Director of Public and Private Markets, <b>Nest Pensions</b>	14:15 <b>Investors views on investment opportunities in Europe</b> <ul style="list-style-type: none"> <li>- What macro and geopolitical factors are impacting the decisions of asset allocators?</li> <li>- Assessing the attractiveness of various real estate strategies to investors</li> <li>- Strategies and considerations for LPs to navigate uncertainty and volatility in the European real estate market</li> </ul> <b>Anne Koeman-Sharapova</b> , Head of Europe Real Estate Investment, <b>Mercer</b>	14:15 <b>Asset allocation, fundraising and the denominator effect</b> <ul style="list-style-type: none"> <li>- How do terms and pricing look for unitranche deals in contrast to syndicated debt?</li> <li>- Pros and cons of sole lenders vs club deals</li> <li>- How do LPs view the club approach and perceive club deal making in general?</li> </ul> <b>Christine Farquhar</b> , CEO of UK and Europe, <b>Cambridge Associates</b>
14:50 <b>The Infrastructure landscape in 2025 and beyond</b> <ul style="list-style-type: none"> <li>- Why is there an abundance of optimism for growth in infrastructure currently?</li> <li>- Increasing diversification of infrastructure asset types</li> <li>- Assessing where the boundaries will be pushed to next in infrastructure</li> </ul>	14:50 <b>Navigating the rise of healthcare investing in private equity</b> <ul style="list-style-type: none"> <li>- Is healthcare still primarily a place for specialist investors? What's needed to attract larger pools of capital?</li> <li>- Which sub-sectors of healthcare are proving most resilient to market turbulence?</li> <li>- How are investors setting themselves up</li> </ul>	14:50 <b>Unlocking opportunities: exploring the landscape of European real estate debt</b> <ul style="list-style-type: none"> <li>- To what extent is this a golden era for real estate debt?</li> <li>- The rise of the insurance lender in large property markets and the implications for borrowers and lenders</li> <li>- Strategic opportunities and challenges for investors and lenders</li> </ul>	14:50 <b>The workings of multi lender unitranche club deals</b> <ul style="list-style-type: none"> <li>- Which strategies are LPs favouring in an inflationary climate?</li> <li>- How is the denominator effect impacting direct lenders' fundraising efforts?</li> <li>- What does the denominator effect mean for portfolio construction and investment decisions?</li> </ul>

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<b>Alice Brogi</b> , Partner, <b>Gibson Dunn</b>	for success in a complex sector?		
15:25 <b>Coffee break</b>			
15:40 <b>Analysing the emerging stars: Hydrogen, batteries, and EV charging in the age of sustainable investing</b> <ul style="list-style-type: none"> <li>- Established infrastructure or optimistic/value-add? How to correctly define the energy subsectors</li> <li>- The role the subsectors play to enable the energy transition</li> <li>- Exploring the sustainability of batteries and EV charging</li> </ul> <b>Patricia Rodrigues Jenner</b> , Member of Infrastructure Investment Committees UK, <b>GLIL &amp; Africa's AIIM</b>	15:50 <b>Integrating ESG with value creation</b> <ul style="list-style-type: none"> <li>- How do sustainability strategies increase profitability and sell-on value</li> <li>- To what extent does implementing sustainability increase resilience?</li> <li>- Case studies from real PE investments</li> </ul> <b>Elena Mariotti</b> , Managing Director - Head of ESG Stewardship, <b>Cerberus Capital Management</b>	15:50 <b>Decarbonising real estate: driving better long-term financial performance with sustainability initiatives</b> <ul style="list-style-type: none"> <li>- How sustainability initiatives can lead to cost savings, increased property value, and improved return on investment</li> <li>- Understanding the impact of evolving environmental regulations and building codes on real estate portfolios</li> <li>- Exploring innovative technologies and strategies for decarbonising real estate portfolios</li> </ul> <b>Hala El Akl</b> , Vice President of Sustainable Investing and Operations, <b>Oxford Properties Group</b>	15:50 <b>Generating upside from sustainability in private debt</b> <ul style="list-style-type: none"> <li>- What are managers doing to create value in their portfolios?</li> <li>- Does ESG-compliant private debt strategies result in an increased credit quality within the portfolio?</li> <li>- Should all investments be structured as sustainability linked loans or is it not always suitable for the borrower?</li> </ul> <b>Sabrina Fox</b> , CEO, <b>European Leveraged Finance Association</b>
16:10 <b>Infrastructure Case Study</b>	16:10 <b>Private Equity AI Case Study</b>	16:10 <b>Real Estate Case Impact Study</b>	16:10 <b>Private Debt Case Study</b>
16:30 <b>The continuing strength of infrastructure debt</b> <ul style="list-style-type: none"> <li>- Identifying strategies for effectively managing risk and liquidity in today's environment</li> <li>- Investigating if infrastructure debt will continue to outperform alternative credit strategies</li> <li>- What the future holds for investors and borrowers</li> </ul>	16:30 <b>Growth and Venture in Europe</b> <ul style="list-style-type: none"> <li>- Discussing the various exit strategies available to European venture &amp; growth</li> <li>- Analysing the latest funding trends in European startups,</li> <li>- Assessing the regulatory environment for venture capital and growth-stage investments in Europe and its</li> </ul>	16:30 <b>Prospering in a more challenging environment for logistics and industrials</b> <ul style="list-style-type: none"> <li>- Implementing strategies to build resilience against disruptions</li> <li>- How does Europe compare with other markets in terms of opportunities for investors?</li> <li>- Value creation opportunities from</li> </ul>	16:30 <b>Is specialty finance ripe with opportunity?</b> <ul style="list-style-type: none"> <li>- Why are niche markets so attractive to investors right now?</li> <li>- Do higher returns mean higher risk in this segment of the market and are investors being compensated for the risk?</li> <li>- Opportunities across ABL, bridge financing, aviation, royalties, NAV</li> </ul>

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<b>Aurelie Hariton-Fardad</b> , Managing Director, <b>MetLife</b> <b>Investment Management</b>	implications for investors <b>Jan Rutherford</b> , Partner, <b>Scottish Equity Partners</b>	leveraging innovative technologies	financing, litigation finance etc.
17:05 <b>Infrastructure Think Tank</b> <b>over drinks</b> <i>Sponsored opportunity to</i> <i>host</i>	17:05 <b>Private Equity Think Tank</b> <b>over drinks</b> <i>Sponsored opportunity to</i> <i>host</i>	17:05 <b>Real Estate Think Tank</b> <b>over drinks</b> <i>Sponsored opportunity to</i> <i>host</i>	17:05 <b>Private Debt Think Tank</b> <b>over drinks</b> <i>Sponsored opportunity to</i> <i>host</i>

17:45-19:15

**Sponsorship Opportunity**

**Close of conference followed by cocktail reception**

**Day Two:**

5 December

7:30-9:00

**Coffee & registration**

08:00-09:00

**Breakfast Networking Sessions**

**6 concurrent networking Workshops**

09:05

**Chairperson's Opening Remarks**

09:10

**The increased importance of value creation in the current environment**

- Considering strategies for value creation in different segments of private markets
- How value creation has changed with higher cost of capital, less transactions, and longer hold periods
- To what extent can AI play a part in value creation and what are funds already doing?
- Case studies of value creation successes in the past 2 years

09:45

**PEI Data Presentation**

09:55

**Tips for success: elevating your fundraising to prosper in a challenging environment**

- Overcoming challenges in fundraising in the current landscape
- Building effective and resilient fundraising strategies
- Investor perspectives: understanding expectations and building lasting relationships
- Exploring new approaches and technologies for private equity success

**Daria Litvinova**, Head of Investor Relations - Partner, **Vauban Infrastructure Partners**

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10:35

**Coffee & networking**

*With themed networking*

11:10

**Secondaries in focus: how the market continues to evolve and grow**

- Analysing the evolving landscape of buyer fees and terms in continuation funds
- Getting LPs comfortably with innovative strategies being employed
- How are the secondary markets in real assets evolving?
- Assessing the true indicators of market health beyond record-breaking fundraises

**Valérie Handal**, Managing Director, **HarbourVest Partners**

11:45

**Unlocking potential: how democratisation can transform private markets**

- To what extent are new investors already reshaping the investment landscape?
- Strategies for managers to leverage the influx of new investors and navigate evolving market dynamics
- Assessing the role of regulatory reforms in expanding access and fostering investor confidence
- Exploring the emergence of innovative structures such as long-term asset funds

12:20

**Private Markets Investment Committee**

*Three hand-picked fund managers will present investment case studies in this exclusive, data-driven and interactive format. Hosted by two experts, you'll have the chance to ask questions, share your thoughts and vote on the transactions in our very own investment committee.*

13:00

**Lunch and room set (Future Leaders arrive)**

*Sponsored opportunity*

- Future leaders' lunch
- Senior leaders' lunch

13:45

**6 concurrent networking Workshops (repeats of 8am sessions so people can do another one)**

14:45-16:30

**Future Leaders Session**

*Sponsorship opportunity to host*

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