

Agenda

Thursday 23 March

08:45 – 09:00

Introduction from Infrastructure Investor and welcome from the chair

Severin Hiller, Co-Head of Infrastructure Debt, **Rivage Investment**

09:00 – 09:40

Opening panel: How are investors combating and overcoming outside pressures?

- From low to high in a heartbeat: how are debt funds coping with the inflationary environment?
- Impact of rising interest rates and continuing geopolitical instability
- Resilience, revenues, and refinancing: considerations for various infrastructure assets

Jorge Camina, Partner & Head of Sustainable Infrastructure Credit, **Denham Capital**

Florence Carasse, Head of Infrastructure Debt, **Pension Insurance Corporation**

Jean-Francis Dusch, CEO, Edmond de Rothschild UK, CIO Infrastructure Debt, **Edmond de Rothschild AM UK**

Laurence Monnier, Director, **1PlanetInfra**

David H. Rosenblum, Fund Partner, **I Squared Capital**

Moderated by: Hans-Peter Dohr, Founder & Managing Director, **Institutional Capital Associates (ICA)**

09:40 – 10:20

Panel: Assessing the state of play in credit: what's on offer for borrowers and investors?

- Liquidity leaving, bank caution and more: what is the state of current intermediation between banks, sponsors and funds in the financing space?
- How will this develop in the near future and what does it mean for other stakeholders in the market?
- Why might these prove favourable conditions for private and institutional investors to increase their exposure to infrastructure debt?

Manuel Dusina, Head of Infrastructure, **Phoenix Group**

Jason Hyungjae Kim, Head of Infrastructure PF Team, **Samsung Fire & Marine Insurance**

Kashif Khan, Director, Infrastructure & Project Finance, **MetLife Investment Management**

Markus Schaen, Principal Fixed Income, **MN**

Claudio Vescovo, Managing Director, Head of Energy Transition Credit Funds, **Glennmont Partners from Nuveen**

Moderated by: Alex Koriath, Head of European Pension Practice, Regional Head of Germany, **Cambridge Associates**

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10:20 – 11:00

Panel: How are debt funds grappling with constantly evolving sustainability developments

- Deciphering how different transactions across different sectors are performing when it comes to ESG requirements
- How can debt funds better communicate to LPs whether certain transactions are compliant under articles 8 and 9?
- Standardisation – the answer to overcoming SFDR, taxonomy and other increasing regulatory disclosure requirements?

Lucy Dale, Director – BlackRock Infrastructure Debt, **BlackRock**
Frank Dornseifer, Managing Director, **BVAI**
Chris Purcell, Investment Director, Debt Investments, **IFM Investors**
Thibault Sauvage, Director, Infrastructure Financing, **CDPQ**
Vivek Sapra, Senior Advisor, Infrastructure Investments, **Ampega Asset Management**

Moderated by: Agnes Mazurek, Head of Product Innovation, **APEX Group**

11:00 – 11:30 Coffee and networking

11:30 – 12:10

Debate: Merits and risks of junior mezzanine vs senior secured debt

- What's the smartest play in the current environment?
- Assessing access to opportunity for both sides in the market
- What is the best balance for savvy institutional and private investors looking to diversify their portfolio?

Karen Azoulay, Head of Real Assets, **BNP Paribas Asset Management**
Stephane Delatte, Chief Executive Officer, **Pierfront Capital**
Sacha Kamp, Managing Director, **Infrantry**
Nick Stockdale, Partner & Head of Europe, Infrastructure Debt, **QIC**
Christopher Quayle, Executive Director, **DC Advisory**

Moderated by: Monika Bednarz, Director, **Lagrange Financial Advisory**

12:10 – 12:40

Presentation: Case Study – The Benefits of Private Infrastructure Credit in a Challenging Economic Environment

- Certainty of execution for project developers / sponsors
- Better terms and relative value for institutional investors
- Access to proprietary origination that protects allocations

Erik Savi, Global Head of Carlyle Infrastructure Credit, **The Carlyle Group**

12:40 – 13:00

LP interview: Optimising your debt portfolio in turbulent times

Michela Bariletti, Chief Credit Officer, **The Phoenix Group**

13:00 – 14:00 Networking lunch

14:00 – 14:40

Panel: Digital and data infrastructure assets to the fore for credit investors

- Assessing the transformation of the digital infrastructure financing space in recent years
- How have debt investors embraced digital infrastructure funds since the pandemic?
- Quality assets, specialisation and creative structuring: the keys to success for lenders

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Timo Buijs, Director Project Finance Digital Infrastructure, **ABN AMRO**
Mustafa Dincer, Founder, **MD Advisors**
Michael Suppan, Director, Deutsche **Bank**
Stefan Wala, Head of Origination, **Kommunalkredit Austria AG**
Yannic Yvon, Head of Corporate & Infrastructure Debt, **DNB Capital Markets**

14:40 – 15:20

Panel: Financing the energy transition

- Debt funds' role amongst equity funds in the global energy transition and path to net zero
- Marking out your roadmap: where do the best opportunities lie across assets, regions and strategies
- Impact of pricing variation and regulation on energy and power assets for debt investments

Claus Fintzen, Chief Investment Officer, Infrastructure Debt, **Allianz Global Investors**
Stefan Futschik, Managing Director, Head of Private Debt, **Prime Capital AG**
Magdalena Kowalska, Executive Director, **Goldman Sachs Asset Management**
Dr. Dimitar Lambrev, Senior Portfolio Manager – Infrastructure Investments, **UNIQA Insurance Group**
Pierre-Antoine Machelon, Managing Director, **Eiffel Investment Group**

Moderated by: Johnnie Barnett, Partner, **The New Amsterdam Group**

15:20 – 16:00

Audience roundtables:

- Emerging market debt opportunities **facilitated by** Alex Bebov, Managing Partner, **BAC Securities**
- Sector discussion: digital, energy, social, logistics and more
- ESG and sustainability: GP challenges
- Investor relations and fundraising for debt

16:00 – 16:10 Closing comments from the chair

Join the event

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