

Investor Summit

4-5 November | New York

The leading event series for thematic investing in private markets

Event website: www.peievents.com/en/event/new-private-markets-investor-summit-north-america

Confirmed speakers for 2025 include:

1. Mark Berryman, Partner, **Capricorn Investment Group**
2. John Goldstein, Global Head of Sustainability & Impact Solutions, Asset & Wealth Management, **Goldman Sachs**
3. Rahul Advani, CEO and Managing Partner, **SER Capital Partners**
4. Kunal Doshi, Partner, **Accelerate Investment Group**
5. Mark Hays, Managing Director, Director of Sustainable and Impact Investing, **Glenmede**
6. Susan McGeachie, Co-Founder & Managing Partner, **Global Climate Finance Accelerator**
7. Jonathan Hirschtritt, Managing Director, Sustainability, **GCM Grosvenor**
8. Christina Anzel, Director, **Generation Investment Management**
9. Kenza Himmi, Impact Investing Lead – Associate Investment Officer, **United Nations Joint Staff Pension Fund**
10. Roraj Pradhananga, Co-Chief Investment Officer, **Veris Wealth Partners**
11. Priya Parrish, Partner and Chief Investment Officer, **Impact Engine**
12. Jennifer Pryce, President and CEO, **Calvert Impact**
13. Angelica Nikolausson, Managing Director, **Global Endowment Management**
14. Micah Kotch, Partner, **Blackhorn Ventures**
15. Nicolas Muller, Managing Director (Head of Private Equity Partnerships), **Blue Earth Capital**

For program information:

Boris Petrovic

boris.p@pei.group

For sponsorship opportunities:

Tyler Mitchell

tyler.m@pei.group

For queries:

Customer Services

customerservices@pei.group

16. Pooja Yadav, Principal, **Azarine**
17. Beata Kirr, Chief Impact Officer, **The Copia Group**
18. Daniel Firger, Advisor, Sustainable Finance, **Bezos Earth Fund**
19. Michael Chang, Managing Director, **Global Health Investment Corporation (GHIC)**
20. Speaker TBC, **New Forests**

Programme agenda

Day one

Tuesday 4th November 2025

8.00 *Networking breakfast and registration*

9.00 *Chair's opening remarks*

9.05 **Plenary #1: Allocator perspectives - thematic investing in a complex world**

- How are investors integrating changing incentives, tariffs, climate and AI into their investment strategy?
- What's most important to allocators right now?
- What opportunities is private capital particularly well poised to capture?
- When looking at the investment landscape as an LP, what is the good, the bad and the ugly?
- Are LPs building portfolios for the right future?

John Goldstein, Global Head of Sustainability & Impact Solutions, Asset & Wealth Management, **Goldman Sachs**

9.50 **Plenary #2: Reshoring, post-globalisation and supply chains – the new megatrend**

- What is the future of manufacturing in the US?
- How is the advanced industrial manufacturing unfolding?
- Where are investors finding opportunity in reshoring and which sectors are set to benefit most?
- How are geopolitical and trade shifts creating opportunity in domestic supply chains?

10.30 Break

11.00 **Keynote #1**

11.20 **Plenary #3: Future of US energy - Investing in energy security and resilience**

- Unprecedented demand load is coming, can supply keep up?
- How should investors think about “clean electrons” vs “clean molecules”?
- Can climate-conscious investors back AI and still meet decarbonisation goals?
- Where are the investable opportunities in battery storage, grid optimization, power transmission, storage, and reliability?
- How are corporates solving their own energy security—and can investors follow?

12.00 **Keynote #2**

12.20 **Plenary #4: Investing in a safe and just AI transition**

- How can the vast productivity gains from AI be democratized?
- How can investors direct funding to help manage societal and economic disruption brought on by AI?
- What are the risks of inaction on safety considerations in AI?
- How can funds ensure ethical alignment of AI investments?

1.00 Lunch

After lunch the conference splits into three streams, the streamed sessions are designed for you to hear from best-in-theme managers and get detailed insights on the innovations, trends and investment opportunities on the horizon.

Stream A	Stream B	Stream C
----------	----------	----------

2.00-2.45	Future energy: Grids, batteries, efficiency and beyond <ul style="list-style-type: none"> What are the PE opportunities in the future energy thematic? What are the opportunities in grid modernisation? How are critical mineral dependencies shaping investment risk and return? To what extent are distributed and decentralised energy solutions in the US going to take off? Is nuclear (fusion, fission, SMRs) finally entering the investable conversation? 	Investing in inequality solutions: overview of the best and brightest opportunities <ul style="list-style-type: none"> How can funds target root causes (e.g. food, housing, workforce gaps) instead of symptoms? What are the most transformative models or case studies of effective social impact around the world? Is there a lack of replicability between countries and regions? To what extent are social investment opportunities emerging as a result of welfare institutions retreating? 	How to invest in climate adaptation <ul style="list-style-type: none"> As climate change becomes more palpable, is it time for a heavy pivot to adaptation (away from mitigation)? Is climate adaptation largely an infrastructure investment play? What are some of the best examples of climate adaptation solutions around the world? What are climate resilience investors going after in terms of asset selection? Water scarcity: what opportunities are emerging in water tech, access, purification, and infrastructure?
2.45-2.50	<i>Changeover break</i>		
2.50-3.35	Workforce and skills: What will be the value of labour in the AI age? <ul style="list-style-type: none"> What is the future of human labour? Where are the most significant labour gaps? How are funds active in the workforce development and education market faring? 	The new frontiers of health investing <ul style="list-style-type: none"> What role do investors (vs policymakers) have to play in the betterment of health systems? What are the emerging themes in women's health? How has AI impacted the landscape of investments across the health spectrum e.g. in 	On the up: The next phase of circularity investing <ul style="list-style-type: none"> How is circularity, as a trend, evolving? What technologies and innovations are driving progress in materials recycling and reuse?

	<ul style="list-style-type: none"> Where is the alpha and return opportunity for investors active in the education and future-of-work space? 	<p>drug discovery, assisting doctors' decision-making, hospital management etc?</p> <ul style="list-style-type: none"> What are the opportunities in biotech, wellness, and 'health span' investing? <p>Michael Chang, Managing Director, Global Health Investment Corporation (GHIC)</p>	<ul style="list-style-type: none"> What are the regulatory trends in sustainable consumption and waste? Is corporate interest and investment in circularity likely to grow? How do private investors access waste reuse, recycling tech, and circular business models? <p>Angelica Nikolausson, Managing Director, Impact Investments, Global Endowment Management</p>
3.35-4.00	Networking break		
4.00-4.45	<p>AI safety and assurance</p> <ul style="list-style-type: none"> As the world becomes ever more digitised, what is the investment opportunity set which is emerging in security and safety? Some leading impact investors have shifted their focus toward safeguards for tech, why have they done so? What are the risks of inaction on safety considerations in the tech sector? What is the opportunity set within this theme, in things such as AI safety, ethical cloud, deepfake detection, cybersecurity, privacy etc? 	<p>Growing and democratising ownership</p> <ul style="list-style-type: none"> To what extent is ownership a scalable means to addressing inequality? Is employee ownership growing? What are the case studies from some of the pioneer investors that have ownership within their theory of change? Can investments focused on ownership attract more allocation? 	<p>Nature strategies: what's investable?</p> <ul style="list-style-type: none"> What are the fundamentals driving viability of natural capital as investments? Is it possible invest meaningfully in nature via growth strategies? How are managers active in the market deploying their capital? Is the term 'natural capital' being abused? How credible are nature-based and tech-based offset solutions?

4.45-4.50	<i>Changeover break</i>		
4.50- 5.35	Debt deep dive: The best of mission-aligned debt strategies <ul style="list-style-type: none"> What is the diversity of debt strategies in the market? How are mission aligned debt strategies distinct from mainstream strategies? What do debt strategies offer to investors currently, relative to equity? 	Affordability as an investment theme: cost of living, housing and health <ul style="list-style-type: none"> How are investors tackling affordability of living issues? Which technologies and models are providing the most real-world impact? To what extent are issues in affordability of health and housing likely to evolve? How can solutions to affordability issues be financed and scaled? 	Future food systems <ul style="list-style-type: none"> How are food supply chains likely to be impacted by climate change? What's new in food system investing? What are leading corporates doing about food supply chain resilience, and what opportunities does it present to PE funds? What should genuinely excite in regenerative agriculture and soil health? How will local food systems look in a 'deglobalized' world?

5.35 Evening networking reception

Day two Wednesday 5th November 2025

7.00 Networking breakfast and registration

Day two morning workshops

	Workshop #1: Being an investor in the 'post-globalised' world	Workshop #2: How to build a good impact strategy	Workshop #3: LP workshop: allocating in the coming decade
--	--	---	--

8.30-9.45	<ul style="list-style-type: none"> Which types of investors and skill sets are most likely to thrive in the new world order? How are investors finding opportunity in de-globalisation? What types of sectors and business models are best prospects in the medium-term? 	<ul style="list-style-type: none"> How are leading mission-aligned funds demonstrating and executing their impact? What are the pillars to a credible impact strategy? What is part of a well-thought-out theory of change? Should your fund have third-party verification mechanisms to impact claims? How are the concepts of intentionality and additionality, double materiality being applied practically? 	<p><i>LP-only session</i></p> <ul style="list-style-type: none"> How is the skill set of being an effective allocator changing? What filters are investors using to screen bad investments? Which sectors, themes and strategies are most appealing at present, and why? How are different investors doing due diligence? <p>Priya Parrish, Partner, Chief Investment Officer, Impact Engine</p>
9.45-10.00	<i>Short break</i>		
10:00-11.15	<p>Workshop #4: Adapting to AI and rapid tech disruption</p> <ul style="list-style-type: none"> How quickly is the economy changing due to AI? What can funds do to get ahead of the disruption curve? How are investors looking to keep pace with tech-enabled change? How can impact funds get exposure to AI? 	<p>Workshop #5: Aligning with corporate strategics: priorities, fundraising and exits</p> <ul style="list-style-type: none"> Which issues are corporates most focusing on now? How can private market investors best partner with corporates in different sectors? To what extent are corporates a good source of exits? What are the best practices in fundraising from corporates? What are the special considerations when engaging with the corporate as a partner? 	<p>Workshop #6: First-of-a-kind projects: how to de-risk and realise innovation</p> <ul style="list-style-type: none"> What are the ingredients to success with first-of-a-kind projects? What's worked (or failed) in project execution? What are the right capital stacks for early infra? How do you assess project risk on things like geothermal, SMRs, or DAC? Can corporate partnerships unlock deployment at speed?

11:15-11:30	Short break		
11:30-12:30	<p>Workshop #7: Fundraising strategy: fund labelling, structures and positioning</p> <ul style="list-style-type: none"> What alternative fund structures are more appropriate (e.g. evergreen models) for thematic investing? What are the language options that make most sense in terms of fund branding ('Mission aligned', 'Transition', 'Impact', 'Inclusive Growth', etc)? What themes and specialisms are garnering most interest from LPs? Is specialisation now table stakes? What's the right team, and track record mix, to raise in the current market? <p>Angelica Nikolausson, Managing Director, Impact Investments, Global Endowment Management</p>	<p>Workshop #8: How to address private markets' liquidity problem</p> <ul style="list-style-type: none"> What other structures are helping investors with their need for liquidity in the current market environment? Are secondaries a good solution to the liquidity problem? What's next in private market liquidity management? When are secondaries, continuation funds, and creative liquidity solutions appropriate? Are continuation vehicles a bridge or a band-aid? 	<p>Speed networking</p> <p>In this session we'll have speed networking between conference delegates.</p> <p>A great way to meet 6-8 new people with 4-minute per meeting.</p> <p>Please note, places are limited and look out for our communication regarding how to sign up.</p>



New Private Markets Investor Summit 2025

November 4-5, 2025

Convene 360 Madison Avenue, New York

12.30 Lunch

1:30 **Day two keynote**

2:00 **Debate TBC**

2:50 Closing remarks

3:00 End of conference