

# 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](http://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**

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16. Pooja Yadav, Principal, **Azarine**
17. Beata Kirr, Chief Impact Officer, **The Copia Group**
18. Daniel Firger, Founder and Managing Partner, **Great Circle Capital Advisors**
19. Michael Chang, Managing Director, **Global Health Investment Corporation (GHIC)**
20. Kim Foley, Associate Director of Investor Relations, **New Forests**
21. Lila Preston, Partner and Head of the Growth Equity, **Generation Investment Management**
22. Milo Werner, General Partner, **DCVC**
23. Mike Fang, Senior Portfolio Manager, **Maryland State Retirement and Pension System**
24. Jennifer Kenning, CEO & Co-Founder, **Align Impact**
25. Jeff Finkelman, Managing Director of Sustainable Investing, **Fiduciary Trust International**
26. Virginie Morgon, Managing Partner, **Ardabelle Capital**

## Programme agenda

### Day one

#### Tuesday 4<sup>th</sup> 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 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 | <b>Future energy: Grids, batteries, efficiency and beyond</b> <ul style="list-style-type: none"> <li>What are the PE opportunities in the future energy thematic?</li> <li>What are the opportunities in grid modernisation?</li> <li>How are critical mineral dependencies shaping investment risk and return?</li> <li>To what extent are distributed and decentralised energy solutions in the US going to take off?</li> <li>Is nuclear (fusion, fission, SMRs) finally entering the investable conversation?</li> </ul> <p>Mike Fang, Senior Portfolio Manager, <b>Maryland State Retirement and Pension System</b></p> | <b>Investing in inequality solutions: overview of the best and brightest opportunities</b> <ul style="list-style-type: none"> <li>How can funds target root causes (e.g. food, housing, workforce gaps) instead of symptoms?</li> <li>What are the most transformative models or case studies of effective social impact around the world?</li> <li>Is there a lack of replicability between countries and regions?</li> <li>To what extent are social investment opportunities emerging as a result of welfare institutions retreating?</li> </ul> | <b>How to invest in climate adaptation</b> <ul style="list-style-type: none"> <li>As climate change becomes more palpable, is it time for a heavy pivot to adaptation (away from mitigation)?</li> <li>Is climate adaptation largely an infrastructure investment play?</li> <li>What are some of the best examples of climate adaptation solutions around the world?</li> <li>What are climate resilience investors going after in terms of asset selection?</li> <li>Water scarcity: what opportunities are emerging in water tech, access, purification, and infrastructure?</li> </ul> |
| 2.45-2.50 | <i>Changeover break</i>  |   |  |
|           | <b>Workforce and skills: What will be the value of labour in the AI age?</b> <ul style="list-style-type: none"> <li>What is the future of human labour?</li> </ul>   | <b>The new frontiers of health investing</b> <ul style="list-style-type: none"> <li>What role do investors (vs policymakers) have to play in the betterment of health systems?</li> </ul>   | <b>On the up: The next phase of circularity investing</b> <ul style="list-style-type: none"> <li>How is circularity, as a trend, evolving?</li> </ul>  |

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| 2.50-3.35 | <ul style="list-style-type: none"> <li>Where are the most significant labour gaps?</li> <li>How are funds active in the workforce development and education market faring?</li> <li>Where is the alpha and return opportunity for investors active in the education and future-of-work space?</li> </ul>   | <ul style="list-style-type: none"> <li>What are the emerging themes in women's health?</li> <li>How has AI impacted the landscape of investments across the health spectrum e.g. in drug discovery, assisting doctors' decision-making, hospital management etc?</li> <li>What are the opportunities in biotech, wellness, and 'health span' investing?</li> </ul> <p>Michael Chang, Managing Director, <b>Global Health Investment Corporation (GHIC)</b></p> | <ul style="list-style-type: none"> <li>What technologies and innovations are driving progress in materials recycling and reuse?</li> <li>What are the regulatory trends in sustainable consumption and waste?</li> <li>Is corporate interest and investment in circularity likely to grow?</li> <li>How do private investors access waste reuse, recycling tech, and circular business models?</li> </ul> <p>Angelica Nikolausson,<br/>Managing Director, Impact Investments, <b>Global Endowment Management</b></p> |
| 3.35-4.00 | Networking break   |  |  |
| 4.00-4.45 | <p><b>AI safety and assurance</b></p> <ul style="list-style-type: none"> <li>As the world becomes ever more digitised, what is the investment opportunity set which is emerging in security and safety?</li> <li>Some leading impact investors have shifted their focus toward safeguards for tech, why have they done so?</li> <li>What are the risks of inaction on safety considerations in the tech sector?</li> </ul> | <p><b>Growing and democratising ownership</b></p> <ul style="list-style-type: none"> <li>To what extent is ownership a scalable means to addressing inequality?</li> <li>Is employee ownership growing?</li> <li>What are the case studies from some of the pioneer investors that have ownership within their theory of change?</li> <li>Can investments focused on ownership attract more allocation?</li> </ul>   | <p><b>Nature strategies: what's investable?</b></p> <ul style="list-style-type: none"> <li>What are the fundamentals driving viability of natural capital as investments?</li> <li>Is it possible invest meaningfully in nature via growth strategies?</li> <li>How are managers active in the market deploying their capital?</li> <li>Is the term 'natural capital' being abused?</li> </ul>   |

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|            | <ul style="list-style-type: none"> <li>What is the opportunity set within this theme, in things such as AI safety, ethical cloud, deepfake detection, cybersecurity, privacy etc?</li> </ul>   |   | <ul style="list-style-type: none"> <li>How credible are nature-based and tech-based offset solutions?</li> </ul> <p>Kim Foley, Associate Director of Investor Relations, <b>New Forests</b></p>  |
| 4.45-4.50  | <i>Changeover break</i>  |   |  |
| 4.50- 5.35 | <p><b>Debt deep dive: The best of mission-aligned debt strategies</b></p> <ul style="list-style-type: none"> <li>What is the diversity of debt strategies in the market?</li> <li>How are mission aligned debt strategies distinct from mainstream strategies?</li> <li>What do debt strategies offer to investors currently, relative to equity?</li> </ul> | <p><b>Affordability as an investment theme: cost of living, housing and health</b></p> <ul style="list-style-type: none"> <li>How are investors tackling affordability of living issues?</li> <li>Which technologies and models are providing the most real-world impact?</li> <li>To what extent are issues in affordability of health and housing likely to evolve?</li> <li>How can solutions to affordability issues be financed and scaled?</li> </ul> | <p><b>Future food systems</b></p> <ul style="list-style-type: none"> <li>How are food supply chains likely to be impacted by climate change?</li> <li>What's new in food system investing?</li> <li>What are leading corporates doing about food supply chain resilience, and what opportunities does it present to PE funds?</li> <li>What should genuinely excite in regenerative agriculture and soil health?</li> <li>How will local food systems look in a 'deglobalized' world?</li> </ul> <p>Lila Preston, Head of the Growth Equity, <b>Generation Investment Management</b></p> |

Day two  
Wednesday 5<sup>th</sup> November 2025

7.00 Networking breakfast and registration

Day two morning workshops

|             |  |  |  |
|-------------|--|--|--|
| 8.30-9.45   | <b>Workshop #1: Being an investor in the ‘post-globalised’ world</b> <ul style="list-style-type: none"> <li>Which types of investors and skill sets are most likely to thrive in the new world order?</li> <li>How are investors finding opportunity in de-globalisation?</li> <li>What types of sectors and business models are best prospects in the medium-term?</li> </ul> | <b>Workshop #2: How to build a good impact strategy</b> <ul style="list-style-type: none"> <li>How are leading mission-aligned funds demonstrating and executing their impact?</li> <li>What are the pillars to a credible impact strategy?</li> <li>What is part of a well-thought-out theory of change?</li> <li>Should your fund have third-party verification mechanisms to impact claims?</li> <li>How are the concepts of intentionality and additionality, double materiality being applied practically?</li> </ul> | <b>Workshop #3: LP workshop: allocating in the coming decade</b><br><br><i>LP-only session</i> <ul style="list-style-type: none"> <li>How is the skill set of being an effective allocator changing?</li> <li>What filters are investors using to screen bad investments?</li> <li>Which sectors, themes and strategies are most appealing at present, and why?</li> <li>How are different investors doing due diligence?</li> </ul> <p>Priya Parrish, Partner, Chief Investment Officer, <b>Impact Engine</b></p> |
| 9.45-10.00  | Short break  |  |  |
| 10:00-11.15 | <b>Workshop #4: Adapting to AI and rapid tech disruption</b> <ul style="list-style-type: none"> <li>How quickly is the economy changing due to AI?</li> </ul>  | <b>Workshop #5: Aligning with corporate strategies: priorities, fundraising and exits</b>  | <b>Workshop #6: First-of-a-kind projects: how to de-risk and realise innovation</b>  |



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|-------------|--|--|--|
|             | <ul style="list-style-type: none"> <li>What can funds do to get ahead of the disruption curve?</li> <li>How are investors looking to keep pace with tech-enabled change?</li> <li>How can impact funds get exposure to AI?</li> </ul>  | <ul style="list-style-type: none"> <li>Which issues are corporates most focusing on now?</li> <li>How can private market investors best partner with corporates in different sectors?</li> <li>To what extent are corporates a good source of exits?</li> <li>What are the best practices in fundraising from corporates?</li> <li>What are the special considerations when engaging with the corporate as a partner?</li> </ul>   | <ul style="list-style-type: none"> <li>What are the ingredients to success with first-of-a-kind projects?</li> <li>What's worked (or failed) in project execution?</li> <li>What are the right capital stacks for early infra?</li> <li>How do you assess project risk on things like geothermal, SMRs, or DAC?</li> <li>Can corporate partnerships unlock deployment at speed?</li> </ul> |
| 11:15-11:30 | Short break  |  |  |
| 11:30-12:30 | <b>Workshop #7: Fundraising strategy: fund labelling, structures and positioning</b> <ul style="list-style-type: none"> <li>What alternative fund structures are more appropriate (e.g. evergreen models) for thematic investing?</li> <li>What are the language options that make most sense in terms of fund branding ('Mission aligned', 'Transition', 'Impact', 'Inclusive Growth', etc)?</li> <li>What themes and specialisms are garnering most interest from LPs?</li> <li>Is specialisation now table stakes?</li> </ul> | <b>Workshop #8: How to address private markets' liquidity problem</b> <ul style="list-style-type: none"> <li>What other structures are helping investors with their need for liquidity in the current market environment?</li> <li>Are secondaries a good solution to the liquidity problem?</li> <li>What's next in private market liquidity management?</li> <li>When are secondaries, continuation funds, and creative liquidity solutions appropriate?</li> <li>Are continuation vehicles a bridge or a band-aid?</li> </ul> | <b>Speed networking</b> <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

- What's the right team, and track record mix, to raise in the current market?

Angelica Nikolausson,  
Managing Director, Impact Investments, **Global  
Endowment Management**

12.30 Lunch

1:30 **Day two keynote**

2:00 **Debate TBC**

2:50 Closing remarks

3:00 End of conference