

Infrastructure Investor Japan Korea Week

10-14 June 2024 (Seoul 10-11 June, Tokyo 13-14 June)

Monday 10 June (Times in KST/JST)

1800: Welcome Cocktail Reception

Tuesday 11 June (Times in KST/JST)

Live Sessions with Korea Investors Simultaneous translation in Korean and English

0830 Registration & Networking

0900 PEI Opening Remarks

0905 LP Fireside Chat

Former CIOs of some of Korea's leading LPs share a retrospective on their investing strategies and the market

Moderator: Keehong Rhee, Former Deputy CIO, **Korea Investment Corporation (KIC)**

Speakers: Changhoon Lee, Former CIO, **Government Employees Pension Service (GEPS)**
Chunsuk Park, Former CIO, **MG Korean Federation of Community Credit Cooperatives (KFCC)**
Kyhong Lee, Former CIO, **Teachers' Pension (TP)**

0940 Keynote Panel: Infrastructure investing at maturation: Will it remain a resilient asset class?

-How will the interest rate environment and continuing geopolitical uncertainty shape GPs' investment strategies going forward?
-Will the impact of digitalisation and decarbonisation continue to drive investment opportunities in the asset class?
-2023 was a challenging year for fundraising – are GPs seeing stronger interest in 2024?

Moderator: Daniel Kemp, APAC Editor, **Infrastructure Investor**

Speakers: Wei-Sun Teh, Executive Director, Infrastructure, **IFM Investors**
Ross Israel, Head of Infrastructure, **QIC**
Hamish Lea-Wilson, Partner, **Igneo Infrastructure Partners**
Mounir Corm, Deputy CEO & Founding Partner, **Vauban Infrastructure Partners**
Darren Keogh, Senior Managing Director, **Stonepeak**

For more information regarding the event, please visit the [event website](#).

1030 Break

1100 Panel: Seizing on the growth opportunities in the energy transition

- How do you find value in growth technologies such as hydrogen and carbon capture?
- What are the untapped or niche areas of the energy transition with the most growth potential?
- How should LPs view supply chain and regulatory challenges when making investments?

Moderator: Moderator: Ayaka Fujiwara, Climate Finance Specialist, **Green Climate Fun**

Speakers: Peter Schümers, Partner & Co-Head Investment, **Energy Infrastructure Partner**

Maximilian Lindner, Partner, **Antin Infrastructure Partners**

Don Dimitrievich, Portfolio Manager, Senior Managing Director, Energy Infrastructure Credit, **Nuveen**

1150 Presentation

Speaker: Ethan Koh, Head of Global Research Operations, **PEI**

1210 Lunch & Networking

1315 Panel: Moving up the risk curve – the case for investing in core plus and value add

- What are the relative merits of investing in higher-risk assets as opposed to core infrastructure in the current economic environment?
- As competition has increased for core-plus infrastructure assets, are returns still as attractive as in previous years? Are deals harder to access?
- Which subsectors and geographies have the strongest growth potential?

Moderator: Dong Hun Jang Senior Advisor, **Yulchon LLC**

Speakers: Sam Lissner, Principal, **Ridgewood Capital**

Jamie Storrow, Managing Director & Head of Infrastructure **Northleaf Capital Partners**

Harsh Agrawal, Senior Partner, **ISquared Capital**

1400 Panel: Specialise or diversify? What are the optimal investing strategies for Korean LPs in the current environment?

- How has the macroeconomic climate impacted on asset allocations?
- What are the correlations and synergies between investing in GX and DX?
- What are the main drivers behind the increasing number and size of sector specific funds in the market?

Moderator: Tom Taylor, Reporter, **Infrastructure Investor**

Speakers: Melannie Pyzik, Managing Director, Head of Investor Solutions, **Argo Infrastructure**

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Partners

Alistair Ray, Partner, CIO, **Dalmore Capital**
Stefano Ghezzi, Director, **Ontario Teachers' Pension Plan**
Omar Jaffrey, Founder & Managing Partner, **Palistar Capital**

1450 Break

1520 Panel: Korean LPs – what is their current appetite for infrastructure compared to other private assets?

- What is the current Korean LP appetite for infrastructure compared to real estate, private debt, and PE? Does it compare favourably?
- How has the denominator effect impacted on Korean LPs' investment portfolios?
- Do Korean LPs have a current preference/aversion for certain types of GPs? Is it possible for emerging fund managers to successfully fundraise in Korea?

Moderator: Monica Bae, Director, Investor Practice, **AIGCC**

Speakers: David (Guhn-Chang) Lee, Head of Alternative Investment Management Dep. **Korea Investment & Securities**
Kihyun Kim, Portfolio Manager, Alternative Investment Department, **Hyundai Marine & Fire Insurance**

1605 Panel: Korean investors' guide to understanding infrastructure valuations

- Will core infrastructure valuations remain strong in a higher-interest-rate world?
- Understanding the difference in valuations between private vs. public market infrastructure
- Will regulatory pressures and/or other factors lead to tighter scrutiny over asset valuations?

Moderator: Daniel Kemp, APAC Editor, **Infrastructure Investor**
Speakers: Serkan Bahceci, Partner/Head of Research, **Arjun Infrastructure Partners**
Chong Won Kim, Partner, **EY**
Hyeeyoung Yoon, Head of Infrastructure, **NH Investment & Securities**

1645 Cocktail Reception

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