

Women in Private Markets Summit North America 2024

Women in Private Markets Summit: North America 2024

Agenda

Day one: May 15

08:00

Registration and coffee

08:45

PEI Welcome

08:50

Chairperson's welcome

Laurie Mahon, Senior Advisor, Infrastructure Markets

09:00

Keynote: Managing private markets in a fluid environment

Andrea Auerbach, Partner and Head of Global Private Investments, Cambridge Associates

09:30

Allocations and strategic choices for investors in private markets

- Dealing with the denominator effect: to what extent are many investors still over-allocated to private markets?
- The evolution of LPA terms: investor perspectives
- Investor views on GP strategies including continuation funds, margin loans & NAV financing
- Predictions for their allocations in the next decade: which strategies will see more allocations?

Moderator: Keirsten Lawton, Co-Head of US Private Equity Research, Cambridge Associates

Jennie Benza, Investment Manager, Private Markets, General Electric Pension

Leslie Vargas, Senior Portfolio Manager, Resolution Life US

Petya Nikolova, Deputy CIO and Head of Infrastructure Investments, New York City Comptroller's Office

Anne Duggan, Managing Director, Partners Capital

10:10

How are the leading funds in private markets tackling their DEI deficit?

- Example of strategies employed by funds to address internal DEI deficits.
- Analyzing initiatives aimed at promoting DEI within the fund structure and culture

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- Assessing the integration of DEI principles across the funds' investment portfolios and decision-making processes.
- Exploring the impact of DEI-focused actions on fund performance

Moderator: **Marta Castelli**, Methodologies Sector Lead, Corporates & Infrastructure, **S&P Global**
Kara Helander, Partner and Chief Diversity, Equity, and Inclusion Officer, **Carlyle**
Kerryann Benjamin, Chief Diversity Officer and Head of Talent Development, **KKR**
Tracy Stuart, CFA, Managing Partner and Chief Executive Officer, **Corbin Capital Partners**

10:50

Coffee & Networking

11:20

The continued rise of secondaries in private markets

- How is the surge in inflation and higher interest rates affecting secondaries markets?
- To what degree is the decline in M&A activity influencing market dynamics?
- Beyond PE: an exploration of the increase in secondaries in wider private markets
- How will the market evolve and grow in the next decade?

Moderator: **Sijia Cai**, Partner, Investment Management, **Davis Polk & Wardwell**
Cari Lodge, Managing Director, **CF Private Equity**
Tori Buffery, Partner, **Morningside Capital**
Wandy Hoh, Head of Infrastructure Secondaries, **Macquarie Group**

12:00

Democratization of private markets: the emerging landscape in the US and globally

- Providing an overview of the scope of the opportunity
- Investigating potential risks associated with democratization and proposing effective mitigation strategies
- Analyzing the impact of democratization on GP/LP alignment
- Considering some of the innovative strategies that have been launched and what the future could bring

Moderator: **Eileen Duff**, Managing Partner, Chief Client Success Officer, **iCapital**
Lisa Larsson, Managing Director, **StepStone Group**
James Del Gaudio, Managing Director, Head of Private Markets, **Pennsylvania, Public School Employees' Retirement System**
Jenn Phillips, Chief Revenue and Growth Officer, **Forge Global**
Kendra Corbett, Partner, **Cloverlay**

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12:35

Clean tech 2.0: private markets and the transition to net-zero

- How has the IRA transformed activity?
- Innovative ways to invest in an asset class outside of the usual risk/return for the asset class
- The intersection of PE/venture/growth/infrastructure for investing in the energy transition
- How are managers getting LPs comfortable with the different risk/return of investments?

Moderator: **Alexandra Wilde**, Partner, **Clifford Chance**

Tara Mei Smith, ESG Integration Officer, **NYC Office of the Comptroller**

Ashli Aslin, Senior Analyst Real Assets and Infrastructure, **Albourne**

Jamie Vermie, Managing Principal – Impact Investing, **Allstate Investments**

Sarah O'Malley, Managing Director and Investment Strategist for Energy Infrastructure Credit,
Nuveen Infrastructure

13:10

Lunch

<p> Women in Infrastructure Forum</p> <p>14:00 Opening remarks Laurie Mahon, Senior Advisor, Infrastructure Markets</p>	<p> Women in Private Equity Forum</p> <p>14:00 Opening remarks</p>	<p> Women in Real Estate Forum</p> <p>14:00 Opening remarks Gila Cohen, Partner, Chief Investment Officer, Vanbarton Group</p>	<p> Women in Private Debt Forum</p> <p>14:00 Opening remarks</p>
<p>14:05 The state of play in the North American infrastructure market</p> <ul style="list-style-type: none"> - Is the asset class living up to its reputation as a hedge against inflation? - Considering the performance of different sub-asset classes in the current environment - Where are managers seeing opportunities? 	<p>14:05 The state of play in North American private equity</p> <ul style="list-style-type: none"> - Assessing private equity's performance in relation to other asset classes: - Strategies for enhancing PE returns in challenging times - Discussion around market innovations that managers are employing 	<p>14:05 The state of play in North American real estate</p> <ul style="list-style-type: none"> - How is real estate performing amidst macro and market challenges? - In which sub-sectors and regions are there still opportunities? - What next for the asset class? 	<p>14:05 The state of play in North American private credit</p> <ul style="list-style-type: none"> - How does debt compare to other strategies in the current climate? - To what extent is the market concerned by the refinancing risk? How are firms evolving their strategies in a challenging fundraising

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<p>Kemi-Christina Abdul, Managing Director, BlueHaven Anna Dayn, Managing Partner, New End Leonarda Orani, Managing Director Infrastructure US, Ardian</p>	<p><i>Moderator:</i> Virginia Lantz, Vice President, Insight Sourcing, part of Accenture Anne Philpott, Managing Director, Churchill Asset Management Lili Cai, Private Equity Investment Professional, Swiss Re Jana Wayne, Managing Director – Head of Procurement, Hunter Point Capital</p>	<p>Moderator: Dan Winters, Senior Director, GRESB Julie Donegan, Director of Real Estate, CalSTRS Vicky Shiff, CEO, Avrio Real Estate Maggie Coleman, Chief Investment Officer, North America, Real Estate, Manulife Investment Management Wendy Pryce, Head Americas Real Estate Specialist, Nuveen</p>	<p>environment?</p> <p>Moderator: Susan Burkhardt, Partner, Clifford Chance Katherine McElroy, Managing Director, Infrastructure Debt US, Fiera Capital Keirsten Lawton, Co-Head of US Private Equity Research, Cambridge Associates Meenal Mehta, Co-Head of Underwriting, Diversified Lending, Blue Owl Capital</p>
<p>14:45 Short turnaround break</p>			
<p>14:50 Digital infrastructure investing</p> <ul style="list-style-type: none"> - The impact of interest rates and inflation on digital infrastructure - Are there still opportunities in an ultra-competitive space? - The impact of emerging technologies such as AI & machine learning on digital infrastructure <p>Moderator: Leslie Wolff Golden, Managing Director, Global Head of Capital Formation and Investor Relations, Digital Bridge Canan Anli, Senior Advisor, PMP Strategy Danielle Hunt, General Counsel, Tiger Infrastructure Partners</p>	<p>14:50 Dealmaking in US private equity</p> <ul style="list-style-type: none"> - Are valuations still too high? - Evaluating whether dealmaking activities are showing signs of recovery - Identifying hotspots and areas of opportunity <p>Moderator: Sebnem Caglayan, Managing Director, S&P Global Julia Wittlin, Partner, RedBird Capital Partners Lane McDonald, Managing Director, Strategy & Operations, Omers Chenkay Li, Managing Director, Direct Equity Investments, Hamilton Lane</p>	<p>14:50 Where next for logistics and industrial?</p> <ul style="list-style-type: none"> - Do they remain attractive for investors? - Finding opportunities in a crowded market - Innovative approaches to sustainability and value creation to drive returns <p>Moderator: Anne Gales, Partner & Co-Founder, Threadmark Sarah Jancot, Senior Investment Manager, Unlisted Real Estate, Global Logistics, NBIM Geneviève Brassard, Director, Real Estate Investments, PSP Investments Leslie Himmel, Co-Founder</p>	<p>14:50 The rise of sponsorless deals</p> <ul style="list-style-type: none"> - What is the appeal of non-sponsored deals for investors and borrowers? - How are managers sourcing deals and do they compete with banks? - How does a manager's skillset differ to sponsored transactions? <p>Moderator: Sweta Chanda, Managing Director, Head of Business Strategy, Monroe Capital Kerry Dolan, Managing Partner, Brinley Partners Kalina Berova, Portfolio Manager, BCI Shamafa Khan, Managing Director and Head of</p>

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		and Managing Partner, Himmel + Meringoff Properties Patti Unti , Managing Director, Waterfall Asset Management	Investor Relations and Marketing, Crayhill Capital Management
<p>15:25 Short turnaround break</p>			
<p>15:30 Investing in emerging technologies: hydrogen, batteries, EV & more</p> <ul style="list-style-type: none"> - Examining business models in emerging strategies - Considering the extent to which these investments are infrastructure - Investigating the long-term sustainability of battery technology and electric vehicle charging solutions <p>Vidyu Kishor, Director, Renewables and Grid Solutions, Osaka Gas USA Dr. Barbara Weber, Founding Partner, B Capital Partners Irene Mavroyannis, Global Co-Head of Business Development, Infrastructure, Partners Group (USA)</p>	<p>15:30 Considering how different strategies are faring in a more challenging environment</p> <ul style="list-style-type: none"> - Defining the mid-market: scale and strategies - What strategies and size of funds are faring well in a challenging market? - How are investors viewing different strategies on performance and DEI? And is this impacting investment decisions? <p>Moderator: Stephanie Smith, Chief Operating Officer - Equity Private Markets & Private Markets Platform, BlackRock Catherine Hatch, Private Equity Allocator, Alaska Permanent Fund Corporation Aiyu Yuan Nicholson, Partner, StepStone Group Sheryl Schwartz, Chief Investment Officer, ALTI Kavita Datta, Investor Relations and Business</p>	<p>15:30 Analyzing the current landscape of real estate debt investing</p> <ul style="list-style-type: none"> - Investor views on real estate debt during turbulent times - How are interest rates and inflation affecting real estate debt? - Predictions for the next decade <p>Moderator: Samantha Rowan, Editor, Real Estate Capital USA Robin Potts, Partner and CIO, Canyon Partners Real Estate Sarah Schwarzschild, Chief Operating Officer, Mavik Capital Management Wendy Cai-Lee, CEO and Founder, Piermont Bank Molly Mahoney, Managing Director, Slate Asset Management</p>	<p>15:30 Special situations and distressed debt</p> <ul style="list-style-type: none"> - Outlining the scale of the opportunity as more companies run into trouble - To what extent are managers having to adapt their skillsets in the new normal? - Identifying sectors and strategies where there are opportunities <p>Moderator: Maja Zerjal Fink, Partner, Clifford Chance Lexi Fallon, Formerly - Special Situations, CPPIB Tingting Zhang, Founder & Chief Executive Officer, TerraCotta Group Eric Newman, Treasury Manager, City of Stamford Beth Duggan, Associate General Counsel, Polen Capital</p>

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Development, **Cebile Capital**

16:05

Coffee & networking

16:25
The resilience of infrastructure debt

- How is infrastructure debt performing in the current economy?
- Examining the pivotal role played by infrastructure debt in financing critical projects
- Expectations for fundraising in the next year

Mansi Patel, Managing Director, Head of Infrastructure Debt, **MetLife Investment Management**
Marie-Noël Ouellet, Managing Director, Infrastructure Financing, **CDPQ**
Kate Dorsey, Principal, **Stonepeak**

16:25
Emerging manager update: how are new strategies performing?

- Fundraising tips for emerging managers in a tough market
- Laying the groundwork for lasting success
- Case studies from the past 12 months

Liz Campbell, Chief Investment Officer, **Portfolio Advisors**
Gayatri Sarkar, Founder and CEO, **Advaita Capital**
Michelle Jacobi, Managing Director, **Gatewood Capital**
Agata Rzamek Praczuk, Director, **Metlife Investment Management**

16:25
Multifamily investing: trends, regulation and potential for expansion

- Why are more firms targeting opportunities in multifamily?
- The importance of regulation in attracting investors
- Considering opportunities beyond the US in this sub-asset class

Moderator: **Mary D'Souza**, CIO, **Misha Investments**
Erin Miller, Executive Managing Director, **NEWMARK**
Maddi Sampson, Vice President, International Real Estate, **QuadReal Property Group**
Erin Beitz, Senior Vice President, Residential, **Rockhill Management**

16:25
Opportunities in the growing speciality finance space

- How are specialty finance companies changing business models?
- Investigating the adoption of advanced data analytics and technology-driven solutions
- Predictions for the next 5 years

Moderator: **Michelle Noyes**, Managing Director, Head of Americas, **AIMA**
Nicole Byrns, Alternative Asset Investor, **Independent**
Meggie Daoust, Senior Director, Capital Solutions, **CDPQ**
Kelsey Read, Director, Capital Markets, **Castlelake**
Rebecca Chia, Head of Business Development and Investor Relations, **Atalaya Capital Management**

17:10 Short turnaround break

17:15
Crystal ball session: what does the future hold for infrastructure?

17:15
Venture & growth investing in a bear market

17:15
The future of offices in North America

17:15
Corporate credit in a changing environment

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<ul style="list-style-type: none"> - The extent to which infrastructure will move further into other asset classes - Predictions for fundraising and deal volume in the next 18 months - What is the next megatrend in infrastructure investing? <p>Moderator: Jane Bowes, Managing Director, Threadmark Janice Ince, Managing Director, Pantheon Abigail Leung, Principal, HOOPP Infrastructure Kate Roscoe, Senior Managing Director, Manulife Investment Management Sue Yang, Investment Director – Next Gen, Antin Infrastructure Partners</p>	<ul style="list-style-type: none"> - How have investors adapted to the different macro-environment? - Understanding the strategies employed by investors to navigate risk and seize opportunities - Evaluating the role of diversification and adaptive portfolio management <p>Summer Zhao, Investment Director, Lafayette College Rudina Seseri, Founder & Managing Partner, Glasswing Ventures Kirsten Morin, Partner, HighVista Strategies Stephanie Campbell, General Partner, The Artemis Fund</p>	<ul style="list-style-type: none"> - What will office investing look like in 10 years? - Future-proofing your office portfolio - Where in the US and globally are investors seeing opportunities? <p>Moderator: Tim Savage, Clinical Assistant Professor, NYU Schack Institute of Real Estate Marion Jones, Managing Director, JLL Capital Markets Americas Gila Cohen, Partner, Chief Investment Officer, Vanbarton Group Rachel Loeb, Chief Investment Officer, Benenson Capital Partners</p>	<ul style="list-style-type: none"> - What is driving the opportunity set for flexible capital providers? - How to capitalize on corporate opportunities thru market cycles - Outlook for public and private opportunities <p>Helena Wang, Principal, Capital Solutions Group, CPPIB Mary Rooney, Managing Director, JP Morgan Kristina Matthews, Managing Director, Client & Product Solutions, Onex</p>
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17:50

Cocktail reception

Day Two: May 16

08:00-9:00

Invitation only think-tanks

These sessions will allow women to speak freely about the issues impacting their office and asset class. It is a closed door, open conversation where attendees can benchmark ideas and share best practices to gain solutions for common concerns.

- Infrastructure
- Private Equity
- Private Debt: **Sweta Chanda**, Managing Director, Head of Business Strategy, **Monroe Capital**
- Real Estate: **Gila Cohen**, Partner, Chief Investment Officer, **Vanbarton Group**

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09:10

State of Private Markets: GP Perspectives on the evolution of alternatives

- How are managers modifying their approaches to navigate shifts in interest rates and inflation?
- To what extent are managers incorporating emerging technologies and innovative solutions to gain a competitive edge?
- Anticipating and navigating forthcoming regulatory changes affecting private markets
- Developing younger talent who are experiencing their first bear market

Elisabeth Troni, Managing Director, Fund Manager, **CBRE Investment Management**

Lisa Sun, Managing Director and Co-Head of the BlackRock Secondaries and Liquidity Solutions (SLS),
BlackRock

09:45

Fundraising in a more challenging environment

- Developing a value proposition that articulates how you will thrive
- Adopting an investor-centric approach: how can managers differentiate themselves?
- Highlighting case studies to underscore your fund's ability to adapt and excel in difficult market conditions
- Learnings from those who have been on the road in the last 12 months

Ilene Levinson, Managing Director, Fund Investments, **Hamilton Lane**

Alexandra Bazarewski, Partner, **Rede Partners**

Mahsa Zeinali, Senior Vice President, Capital Partnering, **Reverence Capital Partners**

10:25

PEI Fundraising Report

Bill O'Connor, Managing Director, **PEI Group US**

10:35

Making co-investments work for all: balancing benefits, fees and trust

- Unlocking benefits for investors and fund managers
- Fee structures in co-investing: striking a balance
- Navigating potential challenges and considerations in co-investing
- GP-led continuation funds: fostering alignment and transparency

Moderator: **Rozmin Ajanee**, Principal, **Jasper Ridge Partners**

Rachel Goldstein, Investment Principal – Co-investments, **Partners Capital**

Elizabeth Weindruch, Managing Director, **Barings**

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Evy Carroll, Senior Associate, Private Equity Co-investments, **Mercer**
Catherine Saunders, Managing Director, **Benefit Street Partners**

11:15

Coffee & networking

11:45

ESG debate: how is sustainability evolving within private markets?

- Assessing the extent to which polarisation is impacting advancements in sustainability within U.S. private markets
- Investigating how the Inflation Reduction Act has transformed the sustainability landscape
- Comparing progress in the US and Europe: is the gap narrowing or widening?
- How are managers dealing with investors with such contrasting views on sustainability?

Moderator: **Ali Humphrey**, Managing Partner, **Arna**

Avantika Saisekar, Managing Director of Sustainable Investing, **Wafra Inc.**

Angela Jhanji, Managing Director, Sustainability - Private Capital, **EQT Partners**

Adriana Becerra Cid, Sustainable Investment Lead for Private Assets, **Lombard Odier Asset Management**

12:30

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.

Amy Wang, Managing Director (Head of Private Credit), **Blue Earth Capital**

Priya Grewal, Investment Manager, **Morrisson**

Jaime Hildreth, Partner, Head of Risk, **WestCap Group**

13:15

Themed Seated Networking Lunch Hosted by Mintz Group

A number of tables throughout the room and the exhibition hall. Attendees can choose which discussion they would like to join

Value Creation – Jill Haberkern (Mintz Group)

ESG – Eleanor Warnick (Mintz Group)

Culture Assessment – Mike Karran (Mintz Group)

Entering New Markets – Liza Baron (Mintz Group)

Managing Reputational Risk – Kelsey Froehlich (Mintz Group)

Navigating Controversies and Disputes in a Portfolio – Jen Cherner (Mintz Group)

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Diligence for Better Relationships with Management – Doug Chisholm (Mintz Group)

Diligence Throughout the Investment Lifecycle – Kathleen Hurt (Mintz Group)

14:30

Close of conference