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| Infrastructure Investor Australia Forum<br>29 October 2025 \| Sofitel Hotel, Melbourne (Times in AEST) |
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| 08:30 \| **Registration & Networking** |
| 09:05 \| **PEI & Chair Opening Remarks** |
| 09:10 **\| Keynote LP Interview**<br>**Speakers:**<br>**Rory Lonergan,** Chief Investment Officer – Infrastructure and Alternatives, **Clean Energy Finance Corporation** with **Daniel Kemp**, APAC Editor, Private Markets, **PEI Group** |
| 09:40 \| **Keynote Panel: Investing in infrastructure in uncertain times – still a resilient asset class?**<br>• Geopolitics, Fragmentation & Energy Security, how are global GPs thinking about macro-economic risks for their portfolios? |

- Is infra still infra? As lines with real estate and private equity continue to blur, what does this mean for the evolution of the asset class?
- Increasing GP bifurcation - what does it mean for the industry? How should LPs look at more specialist funds vs generalists?

**Moderator:**

**Tom Taylor, Reporter, Infrastructure Investor**

**Speakers:**

**Hajir Naghdy,** Senior Managing Director & Head of Asia & the Middle East, **Stonepeak**

**Speaker, Quinbrook Infrastructure Partners**

10:30 | **Break**

11:00 | **Panel: The big debate: Australia vs ROW – is Australia still a premier market for investors?**

- Is Australia Still Attractive?: Relative value, capacity constraints, competitiveness
- Election & Regulatory Outlook: Impact on energy, digital, and infra investment pipelines
- Global perspectives on Australia, how do LPs and GPs view the local market compared to abroad?

**Moderator:**

**Peter Siapikoudis, Managing Director, Campbell Lutyens**

**Speakers:**

**Dan Cave, Senior Consultant, Frontier Advisors**

11:45 | **Presentation**

12:05 | **Panel: Advancing the energy transition amongst geopolitical turbulence**

- Energy Transition at a Crossroads: Trump, nuclear, IRA, and the new geopolitical energy order
- Australia's Energy Grid & Reform: Challenges in stabilization, decentralization, and financing
- Renewables vs Legacy Power: Batteries, solar, virtual power plants.
- Infra-Real Estate Hybrids: Can real estate support the energy transition? (e.g., datacenter collocation)

**Moderator:**

**Jon Philips**, CEO, **Global Infrastructure Investor Association**

**Speakers:**

**Philippe Wind**, Operating Partner, **CDPQ**

**James Xavier,** Associate, Infrastructure, **CBUS**

**Alex du Pasquier**, Senior Manager, Infrastructure, **NSW Treasury Corporation (TCorp)**

12:50 **| Lunch & Networking**

13:50 | **Panel: Australian LPs investing strategies: capital flight or home bias?**

- Are Australian LPs looking offshore for better risk-adjusted returns?

- Marrying Real Estate & Infrastructure: Why LPs are blending allocations
- Super Funds in Transformation: are more Supers moving direct?

**Moderator:**

- **Mary Delahunty,** CEO, **ASFA**

**Speakers:**

**Mark Hector,** Head of Infrastructure, **Aware Super**

**Chloe Brayne,** Head of Private Equity and Unlisted Assets, **Colonial First State**

**Tara Maine,** Senior Investment Asssociate, **HESTA**

**Owen Lewis,** Portfolio Manager – Infrastructure, **TelstraSuper**

14:40 | **PEI R&A Presentation**

**Speaker**:

**Hilary Teo**, Manager, Global Research & Analytics, **PEI**

15:00 | **Panel: The rise and rise of Digital infrastructure**

- Digital Infra in 2025: Towers, data centres, fibre, subsea cables—what's next?
- Datacentres & Power Constraints: Supply-demand mismatch, energy security, valuations
- Infrastructure vs PE vs Real Estate – where does it go in the portfolio?
- Risks & Returns: Open source, cost inflation, regulation—how to mitigate?

15:40 | **Break**

16:10 | **Panel: The flight to core plus: Navigating, risk, return and resilience**

- What's driving the shift? Return compression, competition or risk appetite amongst LPs?
- Energy transition and digital infra as new "core-plus" plays
- Are definitions clear—or is "core-plus" becoming a catch-all?

**Speakers:**

**Peter Antolik,** Partner**, Arjun Infrastructure**

**Energy Infrastructure Partners**

**Achal Bhuwania,** CIO**, Equitix**

**Stephen Hodges,** Senior Consultant, **JANA Investment Advisers**

16:50 | **Panel: The role of private wealth in infrastructure – a new frontier of capital**

- How can fund managers better serve and scale private wealth investors in infrastructure?
- What's the right structure (open-ended, feeder, co-invest) for HNW investors?
- Can infrastructure truly become a mainstream private wealth allocation?

**Moderator:**

**James Cowper,** Director, **Principle Advisory Services**

**Speakers:**

**Martin Randall,** Head of Private Markets, **LGT Crestone Wealth Management**

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| | **Ben Krasnostein,** Managing Partner, **Kilara Capital** |
| | **Catherine Lloyd,** Head of Manager Research, **TRUE Infrastructure** |
| | **Nick Kelly,** Portfolio Manager, **Wilson Asset Management** |
| 17:30 \| **Cocktail Reception & End of Forum** | |