

Asia Forum

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Wednesday, 22 October, Marina Bay Sands, Singapore (Times in SGT)

08:30 | **Registration & Networking**

09:00 | **PEI & Chair Opening Remarks**

Speaker:

John Walker, Executive Chairman, **Eastpoint Partners**

09.10 | **Keynote Interview**

Speakers:

Chin Hau Boon, CIO, Infrastructure, **GIC**

Interviewed by **Daniel Kemp**, APAC Editor, Private Markets, **PEI**

09:40 | **Keynote Panel: The rise of Asia as a key destination for private capital – why now is the time to invest**

- Investing in Asia amid global volatility: U.S. politics & global energy uncertainty. Does the region benefit as a relative safe haven?

- From solar to battery storage - how Asia is leapfrogging in energy transition vs the West
- Global GP perspectives on APAC: why Asia matters in a diversified infra portfolio

Moderator:

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

Speakers:

Hans-Martin Aerts, Head of Infrastructure & Private Natural Capital, APAC, **APG Asset Management**

Rana Karadsheh-Haddad, Managing Director, Infrastructure, Asia Pacific, **CDPQ**

Rajiv Khakhar, Executive Director, **Morrison**

James Chern, Managing Partner & Chief Investment Officer, **Seraya Partners**

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

10:30 | **Presentation**

Speaker:

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

10:45 | **Break**

11:20 | **Panel: Digital Infrastructure & the green data boom**

- Data center development in Asia: Malaysia, Indonesia, and Vietnam's rise versus Europe & US
- Fiber, towers, smart infrastructure: future-proofing digital infrastructure
- How AI is transforming power infrastructure and energy demand forecasting

Moderator:

Daniel Kemp, APAC Editor, Private Markets, **PEI**

Speakers:

Chuan Wei Lim, Partner, **Analysys Mason**

Deepali Bahl, Managing Director, **Augment Infrastructure**

Tugay Yilmaz, Senior Investment Officer, **IFC**

12.10 | **Panel: Powering returns: energy transition as a core infrastructure investment strategy**

- In a shifting global macroeconomic environment what types of renewable investment strategies need to be considered?
- Current market volatility and supply chain risk – how should investors factor in these considerations when investing in the energy transition?
- How do regulatory frameworks and market maturity vary between OECD and Asian markets, and in what ways have current global macroeconomic uncertainties reshaped the opportunity and risk landscape for renewable energy investments?

Moderator:

- **Ray McLaughlin**, Partner, **Sub3Degrees**

Speakers:

Joost van Acht, Managing Director, **ib vogt GmbH**

Daniel Timms, Head of Asset Management Australia & NZ, **Igneo Infrastructure Partners**

Peter Highmore, SVP, Head of Partnerships & M&A, **Orsted**

Marat Zapparov, CEO, **Pentagreen Capital**

13:00 | **Lunch & Networking**

14.00 | **Panel: Sustainable Infrastructure in the Asian context: from policy to portfolio**

- How is Asia's sustainability push in infrastructure accelerating? Is it Trump proof?
- The emergence of impact as a real investable theme in Asian infrastructure and how it is shaping the opportunity set in renewable energy, digital inclusion, social infrastructure, and low-carbon transport
- Private capital's role in working with governments and multilaterals to deliver a 'just transition' in Asia

Moderator:

Sarah Blankfield, Manager, Member Relations – Oceania, **GRESB**

Speakers:

Lavan Thiru, Executive Director, **Infrastructure Asia**

Beatrice Cassottana, Associate, Climate Change, **Global Infrastructure Basel Foundation, GIB**

Esther Chan, Investment Director, **Ninety One**

14.50 | **Panel: A tale of two regions? Investing in Developed vs Developing Asia**

- How do GPs and LPs tailor their Asian investing strategies across the spectrum? Core infrastructure plays in developed markets vs. value-add or impact-focused opportunities in emerging economies?
- Understanding the energy transition investment opportunity in ASEAN vs Japan and Korea
- Understanding the regulatory frameworks of Asian markets, is developed or developing Asian markets easier from a regulatory risk standpoint?

Moderator:

Chandra Reddy, Corporate Advisory and Principal Investments, **Beyond Advisory**

Speakers:

Raghuram Natarajan, CEO, **Blueleaf Energy**

Scott Reinhart, Founder, **Brawn Capital**

Nishant Kumar, Head of Coverage (Asia), **PIDG**

Kenji Kawado, Founder, Representative Director, **Shizen Energy**

Adam Worthington, Managing Director, **WFS Advisory**

15:40 | **Break**

16.10 | **Panel: LP perspectives on the Asian market**

- Where do the region's most active LPs see the global opportunity set for infrastructure?
- Are LPs getting more comfortable with Asian emerging market risk? What's tipping the scale?
- How do LPs underwrite political and FX risk?

Moderator: **Tim Whittaker, Director, EDHEC Infra & Private Assets Research Institute**

Speakers:

Jingyi Zhang, Senior Investment Officer, **AIIB**

Rohit Anand, Managing Director & Head of Asia Infrastructure and Climate Direct Investments,
British International Investment

Kota Yasumura, Senior Director, Private Sector Investment Finance Division 1, Private Sector
Partnership and Finance Department, **Japan International Cooperation Agency (JICA)**

Premraj Janardanan, Director – Infrastructure Investment, **Kumpulan Wang Persaraan
(KWAP)**

17:00 **Closing Remarks**

17:10 | **Cocktail Reception**