

Impact Investor Global Summit

May 19-20, 2026 | The Brewery, London

Event website: www.peievents.com/en/event/impact-investor-global-summit

Special thanks to our advisory board for their insights in shaping the 2026 agenda content:

- Matt Christensen, Global Head of Sustainable and Impact Investing, **Allianz Global Investors**
- Willem Huidekoper, Head of Sustainability and Non-Listed Equities, **IMAS Foundation**
- Michele Giddens OBE, CEO & Co-Founder, **Bridges Fund Management**
- Liza Rubinstein Malamud, Co-founder & Chief Strategy and Impact, **Carbon Equity**
- Andreas Nilsson, Managing Director Impact Team, **Golding Capital Partners**
- Rekha Unnithan, Global Head of Private Equity Impact, **Nuveen**
- Natalie Adomait, Managing Partner, Renewable Power & Transition, **Brookfield**
- Clara Barby, Senior Partner, **Just Climate**
- Nick Abel, Portfolio Manager, Sustainable Investment & Stewardship Strategies (SISS), **California State Teachers' Retirement System**
- Toby Mitchenall, Senior Editor, **New Private Markets**

Agenda

Day one – Tuesday 19th May 2026

8.00 *Networking breakfast and registration*

9.00 *PEI welcome*

9.05 *Chair's opening remarks*

9.10 **Data presentation**

9.20 **Plenary #1: State of impact: evolution of the market and global ecosystem**

- Where is capital most flowing into impact and thematic opportunities?
- Have impact investments provided good returns to LPs to date?
- How has the market evolved in the post-covid era in terms of management and measurement maturity?
- What is the outlook for the coming 5 years?

10.00 **Plenary #2: Global impact allocators: where is impact capital opening, and where is it going?**

- What are the priorities occupying allocator agendas in today's uncertain environment?
- Which long-term, structural opportunities are allocators building their strategies around?
- What are the most investable and sought-after thematic opportunities?
- How are allocators navigating liquidity challenges in private markets?

Nancy Curtin, Global Chief Investment Officer, **ALTI**

Hazman Hilmi Sallahuddin, Chief Investment Officer, **KWAP**

10.45 *Break*

11.15 **Plenary #3: The bigger picture – rethinking sustainable investing in a changing global context**

- Can technology and markets prevent further ecological collapse?
- Are societal values changing, and what will be the implications for impact investing?

- What are the implications for collective impact goals from the move to a multipolar and post-globalised world?
- With sovereignty and resilience being the key strategic priorities in Europe, will sustainability goals be in the rear-view?

Clara Barby, Senior Partner, **Just Climate**

Kieron Boyle, Chair, **Impact Investing Institute**

12.00 **Keynote #1**

12.20 **Plenary #4: The future of world energy investment**

- What's most investable and bankable currently in the energy transition?
- How dependent is the European and global energy transition on cheap technology coming from China?
- How are corporates solving their own energy security, and what's the opportunity for investors?
- How is the growing populist surge in Europe going to impact the will-to-energy-transition?

Liza Rubinstein Malamud, Co-founder, Chief Strategy & Climate Impact, **Carbon Equity**

13.00 Lunch

After lunch the conference splits into four streams, the streamed sessions are designed for you to hear about the latest investment opportunities from best-in-theme managers and get detailed insights on innovations on the horizon.

	Stream A Energy & tech	Stream B Environment	Stream C Social & inequality	Stream D Investment case studies in thematic sectors
14.00	Investable energy solutions: Grid-tech, geothermal, batteries, heat pumps and beyond <ul style="list-style-type: none"> • What are the most investable PE and credit investment opportunities currently in energy transition? • What are the niche opportunities in energy generation, transmission and end-users? • Is energy transition the main megatrend in LP allocation strategies? • How many solutions and technologies are reaching mainstream 'bankability' grade for financing? Willem Huidekoper, Head of Non-Listed Equities, IMAS Foundation Bela Hanratty, Partner, Keeling Capital	Circular economy investing: moving into the mainstream <ul style="list-style-type: none"> • How is circularity, as a trend, evolving? • What technologies and innovations are driving progress in materials recycling and reuse? • What are the regulatory trends in sustainable consumption and waste? • Is corporate interest and investment in circularity likely to grow? • How do private investors access waste reuse, recycling tech, and circular business models? Yi Jean Chow, Investment Partner, Clean Energy Ventures	Systemic social investing: what is the ability of investors to make a real difference? <ul style="list-style-type: none"> • What can investors reasonably achieve in addressing social problems? • Can investments target the root causes of social issues, instead of the symptoms? • Are there good solutions/examples of reviving communities in post-industrial contexts? • How can growing addiction issues in left-behind communities be addressed? 	Nature & ocean strategies In this session we hear presentations on three investment case studies by different funds – performance, context, impact - followed by a Q&A.

14.40	<p>AI's digital and energy infrastructure: can it become green-ed?</p> <ul style="list-style-type: none"> • What can be done in reducing externalities of AI infrastructure? • Data centres have vast energy and water needs – are there plausible sustainable solutions? • Can climate-conscious investors back AI and still meet decarbonisation goals? • What are the green investment opportunities in AI datacentres value chain? 	<p>Between land and sea: investments and impact in food systems</p> <ul style="list-style-type: none"> • What's new in food system investing? • What are leading corporates doing about food supply chain resilience, and what opportunities does it present to PE funds? • What is new in land and ocean based food sustainability? • How will local food systems look in a de-globalised world? 	<p>Investing in emerging markets: a changed proposition?</p> <ul style="list-style-type: none"> • In light of global aid cutbacks, can impact investing replace or supplement traditional aid and development finance? • How are a weakening dollar and geopolitical developments going to impact the attractiveness of EM investments? • What geographies, themes and sectors are ripe for impact in EMs over the next decade? • How do macroeconomic risk factors (inflation, currency volatility, political instability) interact with investor returns in EMs? 	<p>Climate & energy transition</p> <p>In this session we hear presentations on three investment case studies by different funds – performance, context, impact stories - followed by a Q&A.</p>
15.20	<p>Impact in digital safety: AI assurance and cybersecurity</p> <ul style="list-style-type: none"> • What is the investment opportunity set that is emerging in AI assurance and safety? • Some leading impact investors have shifted their focus toward 	<p>Nature: what's most investable?</p> <ul style="list-style-type: none"> • Where are the latest developments in nature-related strategies? • Is the market maturing? • What is the landscape of natural capital, nature-based solutions and nature-positive investment opportunities? 	<p>Affordable healthcare and sustainable health systems</p> <ul style="list-style-type: none"> • Is the debt crisis likely to result in decreased public health budgets in the coming decade? • What investment opportunities exist in helping health systems become leaner and more efficient? 	<p>Water & climate adaptation</p> <p>In this session we hear presentations on three investment case studies by different funds – performance, context, impact - followed by a Q&A.</p>

	<ul style="list-style-type: none"> • safeguards for tech, why have they done so? • What are the risks of inaction on safety considerations in the tech sector? • What is the opportunity set within this theme, in things such as AI safety, ethical cloud, deepfake detection, cybersecurity, privacy, etc? 	<ul style="list-style-type: none"> • What are the realistic investment options today which tap into nature & biodiversity risk? • How investable and bankable are nature projects, asset and business? 	<ul style="list-style-type: none"> • What role do investors (vs policymakers) have to play in the betterment of health systems? 	
16.00	<p><i>30 mins networking break</i></p>			
16.30	<p>Debate: Climate adaptation vs mitigation – <i>this house believes the time has come to fully focus on adaptation</i></p> <p><i>This is an Oxford-style debate in which we'll have two speakers for the proposition and two speakers against, with audience voting on their views at the start and at the end of the session. This session will also be off-the-record.</i></p> <p>The zeitgeist is shifting considerably with the effective repeal of the Inflation Reduction Act and the passing of the 'Big, Beautiful Bill', and the viability of climate mitigation efforts is being brought into question. Certain climate scientists and advocates have conceded defeat in the climate challenge, stating the emissions train is far too big to halt meaningfully, in essence conceding the factors driving climate change are beyond our individual effort and collective control. The question is: should society and investors be preparing for damage control via climate adaptation, or to continue the mitigation grind?</p> <p>The debate session will explore questions such as:</p> <ul style="list-style-type: none"> • As climate change becomes more palpable, is it time for a heavy pivot to adaptation? • Is a disorderly transition on the horizon? • What realistic warming scenario should investors be considering? • Where is the progress in mitigation strategies? • Is a focus on adaptation an implicit concession that mitigation has failed; or can you do both? <p>Matteo Squilloni, Head of Climate Transition - Equity Investments, European Investment Fund</p>			

17.30 Evening networking reception

End of day one

Day two – Wednesday 20th May 2026

Day two speed networking

There will be 4 rounds of speed networking throughout the morning of day two.

This is a great way to meet up to 10 new people with 4 minutes per meeting. Look out for an email from PEI before the event inviting you to sign up for a session – roughly 3 weeks before the event date.

7.30 Networking breakfast and registration

	Stream A	Stream B	Stream C
8.15-9.30	LP-only workshop: allocating in the coming decade <ul style="list-style-type: none">• How is the skill set of being an effective allocator changing?• What filters are investors using to screen out bad investments?• Which sectors, themes and strategies are most appealing at present, and why?• How are different investors doing due diligence? <p>Jake Levy, Director, Impact Investing, AlTi Tiedemann Global</p>	Workshop: Being an investor in the AI age <ul style="list-style-type: none">• How are different investors adapting to rapid AI disruption?• What capabilities is AI allowing for in terms of better data and due diligence?• Which AI tools and resources are investors using to stay ahead of the curve?• What ethical considerations and dilemmas are arising for investors?• What value will humans provide in the investment process? <p>Madeleine Evans, Director, Generation Investment Management</p>	Workshop: Embedding value creation within impact strategy <ul style="list-style-type: none">• How can IMM lead to greater value at portcos?• What do LPs most value in an IMM strategy?• Which levers are the most effective for value creation in the impact strategy toolkit?• How do compliance-led and investment-led value creation approaches differ?• How best can heads of impact best work together with value creation, deal and other teams?

	<p>Anastasia Guham Global Head of Sustainable and Impact Investment, Redington</p> <p>Simon Oosterhof, Senior Portfolio Manager, Van Lanschot Kempen</p>		
09.30-9.45	Short morning break		
9.45-11.00	<p>Workshop: The evolving inequality investing agenda</p> <ul style="list-style-type: none"> • What are the key areas of engagement for investors that are looking to address inequality? • How are funds engaging with worker rights and issues in portcos (such as living wage, freedom of association, worker seats on boards)? • What's the progress on ownership, is the hype around employee ownership justified? • What are the notable models and theories of change that can create real world outcomes? 	<p>Workshop: Structures to de-risk impact opportunities – how to blend catalytic and market-rate capital</p> <ul style="list-style-type: none"> • How can the blended finance model be applied to financing different projects and technologies? • Is complexity the main hurdle to execution in practice? • Can blended finance be used to scale the flow of mainstream capital into impact opportunities? • What is the variety of structures we're seeing in the market? <p>Martin Ewald, Lead, SCALED</p> <p>Natalie de Wit-Solounov, Head of Strategy, DEG</p>	<p>EU regulatory workshop: SFDR 2.0 and beyond</p> <ul style="list-style-type: none"> • How are investors faring with SFDR 2.0 compliance? • What are the perspectives of GPs and LPs on the regulatory landscape? • How does the new SFDR support impact investing as a practice? • What will be the implications of the opt-out clause on disclosures? • How does its impact differ between retail and institutional strategies?
11.00-11.30	Networking break		

11.30-12.15	<p>Resilience via insurance: Deep dive into insurance industry's overlap with impact</p> <ul style="list-style-type: none"> • How are insurers viewing the world in terms of key macro trends and systemic risks? • What's becoming uninsurable? • What are the most material issues for insurers? • What role do insurance companies have as allocators? • Which climate scenarios do they use today, given that they have to put a price on long-term climate-related policy claims? 	<p>The continued growth of impact credit</p> <ul style="list-style-type: none"> • What is the diversity of impact debt strategies in the market? • How are mission-aligned debt strategies distinct from mainstream strategies? • How can creditor have impactful influence on companies with a small window of time? • In case of default, how can funds incorporate the impact mindset when restructuring? 	<p>Dual use of tech: can impact have a role the defence?</p> <ul style="list-style-type: none"> • Can, and should, impact investors latch onto Europe's defence spending surge? • How are fund managers considering the dual-use of technologies in their portfolio, and are they equipped to understand them? • How are investors thinking through risks of associating with the defence industry or market? • Can impact investors genuinely be defence without fundamentally undermining their credibility as 'doing good'? <p>Hugo Jammes, Managing Partner, EDT Ventures</p>
12.15-13.00	<p>Secondaries strategies in the impact market</p> <ul style="list-style-type: none"> • With liquidity tightness in the market – how much more secondaries activity are we seeing? • What is the split between LP-led and GP-led deals? 	<p>Investing in high-return infrastructure: opportunities at the nexus of PE and infra</p> <ul style="list-style-type: none"> • What opportunities do we mean by 'high-return infrastructure'? • How many assets have both infra and PE characteristics in energy and climate? • How have asset owners addressed the "bucketing problem"? 	<p>Key impact economies: Deep dive into Japan's growing impact story</p> <ul style="list-style-type: none"> • How is the impact ecosystem in Japan developing? • Is Japan's GX strategy a game changing template for national transition and industrial strategy?

	<ul style="list-style-type: none"> • What is the case for secondaries for impact GPs and LPs? • How many secondaries transactions in the impact market are there? • What are the considerations around continuation vehicles? <p>Jaime Alvarez, Portfolio Manager, Sustainable Infrastructure & Private Equity, Brunel Pension Partnership</p>	<ul style="list-style-type: none"> • What makes these investments attractive, but tricky to allocate towards? 	<ul style="list-style-type: none"> • How are asset owners in Japan structuring their approach to impact allocations? • What are the key themes, sectors and philosophical approach of Japan's impact market? • What is the opportunity for European and global investors to engage with the Japanese impact market?
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1.00 Lunch

2.00 **Keynote #2**

2.15 **Data & presentations: Impact's performance in facts & figures**

This session will consist of presentations by investment advisors and fund of funds on impact's financial returns performance to date. This session will be off-the-record.

- What is the track record of impact investments? Has the performance been good?
- Is it true that there's no trade-offs between impact and returns?
- How have they performed across vintages, asset classes and themes?
- How difficult has the exit environment been, and are secondaries solutions the answer?

3.00 **The big AI picture: geopolitics, agency and political economy in the AI age**

- How much agency and sovereignty can be had at a national, societal and individual level; what economic dependencies are being created by AI industry?
- What are the choke points in the physical infrastructure and the supply chain for AI (minerals, talent, software and hardware) – and the implications for resource competition?

- How is geopolitics of AI playing out (US, China, Europe and the rest of the world) and the move to multipolar world?
- Can the vast productivity gains from AI be democratised?
- What are the implications for investors, in terms of risks and opportunities?

4.00 Closing remarks

3.05 End of conference