

# Seoul Forum

## PERE Network Seoul Forum 2026

Tuesday, 2nd June 2026 | Conrad Hotel, Seoul

Experience the unmatched scale of PERE Seoul Forum 2026, Korea's largest real estate gathering where institutional investors outnumber managers nearly 1.5:1!

This is your opportunity to connect with Korea's 300 most active institutional investors. Meet with decision makers, learn from industry leaders, build lasting partnerships that will strengthen your position with Korea's leading capital allocators.

With the added bonus of being co-located with Infrastructure Investor Seoul Forum, you unlock unparalleled access to an even broader network of real assets investors, maximising the impact of every meeting and every conversation.

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**Tuesday, 2<sup>nd</sup> June 2026**

(Times in KST)

Live English/ Korean interpretation provided

## 0800 Investors' Breakfast Briefing

- A yearly conference tradition bringing together Korean institutional investors for a closed-door, intimate conversation on the state of real assets.
- A data-driven, honest discussion designed to surface real concerns, real sentiment, and real priorities for the year ahead.
- This year, investors in real estate and infrastructure come together in one room to compare perspectives and share what is truly top of mind.

Ethan Koh, Head of Global Research Operations, **PEI Group**

*\*Open to institutional investors only, email Elliott Chae ([elliott.chae@pei.group](mailto:elliott.chae@pei.group)) to RSVP.*

## 0800 Fundraising Workshop - What Overseas Managers Need to Know about Korean Investors

- How are Korean institutional investors redefining their approach to global managers and what shifts are shaping capital commitments?
- Investors' expectations on fund terms, on-the-ground presence, and alignment
- What must global managers do to build relationships and long-term success across the region?

*\*Open to all, email Genevieve Yap ([genevieve.yap@pei.group](mailto:genevieve.yap@pei.group)) to RSVP.*

## 0830 Registration & Networking

## 0905 View from the Commentary Box- PERE Editor recaps the biggest headlines of H1'26

- A recap of the most consequential breaking news and the top stories that defined global private real estate in H1 2026.
- Interpreting key data points that reveal how fundraising and transaction activity performed in the first 6 months of 2026.
- What these developments mean for investors heading into H2 2026 and the themes to watch for the rest of the year.

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**Speaker:**

Christie Ou, Senior Reporter, **PERE**

**0915 Opening Remarks from Conference Chair**

**Chair:** Yuna Oh, Head, Investor Services Department, **Korea Investor Services**

**0920 Keynote Interview: NPS's Roadmap to navigate market shifts, returns and policy impacts**

- Strategies in portfolio stabilization
- Re-strategizing liquidity
- Opportunities in niche growth sectors
- Managing the impact of inflation

**Interviewer:** Christie Ou, Senior Reporter, **PERE**

**Speaker:** Kyle Lee, Head of Asia Investment, **National Pension Service of Korea**

**0940 Keynote Panel: Investor's outlook on strategic shifts in fund investment structures**

- Addressing macro-economic volatility, interest rate uncertainty and inflation concerns
- Debt over Equity- managing instability in equity valuations
- Considerations for senior real estate credit and private debt to ensure secure cash flow
- Understanding JV and M&A options and structuring trends to battle current financing crisis

**Moderator:** Doyle Kim, Managing Director, **Hana Securities**

**Speakers:**

Michael Ramm, Group Head and CIO, Real Estate Europe, **JP Morgan**

Seonghun Min, Professor, Department of Urban Planning and Real Estate, **University of Suwon**

Hyeong-seok Park, CEO/ Executive Managing Director, **Mastern Investment Management**

Dominic Doran, Senior Director, Real Estate (APAC), **APG Asset Management Stoneshield**

**1030 Networking Coffee Break**

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## 1100 Panel: Global Capital in Motion – Comparing Real Estate Opportunities Across the US, Europe, and Asia

- Market drivers shaping yields and valuations across the US, Europe, and Asia as pricing resets
- Opportunities and risks across office, industrial, residential, and select niche sectors
- How investors are approaching cross-border allocation, diversification, and risk management in a volatile macro environment

**Moderator:** Johnny Adji, Alt Investments Leader, **Mercer**

**Speakers:**

Rikke Lykke, CEO, **Catella**

Elizabeth Bell, Co-Head of Real Estate, **Hamilton Lane**  
**Columbia Threadneedle**

## 1140 Presentation

**Speaker:**

Diego Lopez, Founder & Managing Director, **Global SWF**

## 1210 Networking Lunch

## 1310 Panel: Private Credit's Next Phase - Where Real Estate Debt Still Delivers

- Where is real estate debt still offering compelling risk-adjusted returns, and how are structures evolving across regions and asset types?
- How is borrower demand shifting in 2026, and what types of deals are creating the strongest opportunities for private real estate lenders?
- How are investors allocating to real estate credit today, and which strategies are drawing the most conviction as the market enters its next phase?

**Moderator:**

**Speakers:**

Ravi Anand, Portfolio Manager and Head, Private Real Estate Credit, **Wellington Management**

David Mortimer, Managing Director, Real Estate, **ICG**

## 1350 Panel: Unlocking Alpha through Value-Add Re-positioning

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- Exploring strategies in value add re-positioning beyond existing redevelopment
- Capturing returns through operational intensive assets and specialized sector bets
- Identifying opportunities and entry points for value add alpha
- Trends and strategies in living sector transformation

**Moderator:**

Rocco Fioretti, Senior Vice President, **Threadmark**

**Speakers:**

Gary Kobus, Senior Managing Director, **Lincoln Property Group**

**1430 Panel: Balancing Risk and Return for Korean Investors – Optimal Strategies in the Current Climate**

- Comparing risk–return profiles across core, core-plus, value-add, and opportunistic strategies
- Identifying market conditions and sectors best suited to each investment approach
- Balancing portfolio construction to optimise income, growth, and long-term value

**Moderator:** Sanghoon Ji, Managing Director, **Constellar Capital Partners**

**Speakers:** Jae Hyung Kwon, Senior Country Officer, **International Finance Corporation (IFC)**

Celine Jeeyoun Kim, Senior Manager, **Daol Asset Management**

Jun Park, Director and Head of Korea, **Madison Realty**

**DWS**

**1510 Break**

*The following sessions will be co-located with Infrastructure Investor Seoul.*

**1540 Panel: Spotlight on Investing in Datacentres**

- Where do managers see data centres as sitting on the risk-return spectrum within real assets?
- How are investors assessing the market overall? Is the AI trend continuing to a boom that is translating to investment on the ground?
- What solutions are managers coming up with to get around the issues over power and grid connectivity?

**Moderator:** Elizabeth Oh, Managing Director, **Thrive Alternatives**

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Sunkyo Jeong, Team Head, Global Alternative Investment, **Korea Investment & Securities**

Kai Goh, Co-Founder and Chief Executive Officer, **Digital Halo**

## **1620 Real Assets LP Panel: Navigating New Horizons: Korean LPs Expanding Role In Global Real Assets**

- Which real asset themes—energy transition, data/compute infrastructure, transportation, logistics—are Korean investors most focused on?
- How are investors incorporating geopolitical risk, currency exposure, and valuation discipline into underwriting and pacing decisions?
- Fund manager selection, have priorities changed for investors in the past year?

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

**Speakers:**

Seunghwan Ro, Investment Director, **NH Securities**

Jin Hwan Kim, Head of Real Estate and Infrastructure Investment Team, **TP Pension**

Jungeun Nam, General Manager, Alternative Investment Department, **ABL Life**

Harry Song, Head of US & Europe Real Estate, **POBA**

## **1705 Joint Cocktail Reception**

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