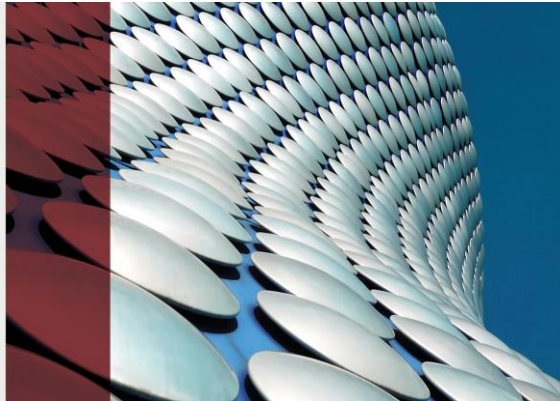


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Investor Forum: Tokyo

Virtual experience 2020

17 September
Virtual event JST/UTC+9



PERE Investor Forum: Tokyo

17 September 2020 | Virtual event JST/UTC+9

Confirmed Speakers Include:

Laurent Jacquemin, Head of Asia-Pacific, **AXA IM Real Assets**
Mitsuhiro Arakawa, Executive Consultant, **Russell Investments**
Kevin Colket, Founder & Chief Executive Officer, **Global Hospitality Investment Group**
Mark Elliott, President, **Hodges Ward Elliott**
Tetsuya Fujita, Country Manager, **CBRE Global Investors Japan**
James Haines, General Manager, **Aozora Bank**
Toshio Fukushima, President and Representative Director, **Daiwa Real Estate Asset Management**
Ari Druker, Director, Loan Origination - Real Estate, Investment Banking Coverage, **Deutsche Securities**
Akihisa Hoshino, Deputy General Manager, Investment Management Department, **Sumitomo Mitsui Trust Bank**
Tokokazu Imazeki, Chief Analyst, **Sanko Estate**
Takeshi Ito, Senior Investment Officer & Chief Operation Officer, **AISIN Employees' Pension Fund**
Shinji Kawano, Head of Overseas Property Investment, **Tokio Marine Asset Management**
Harumi Kadono, Head of Fund Management Department and Managing Director, **IDERA**
Daisuke Kitta, Senior Managing Director, Head of Japan, **Blackstone**
Martin Schulz, Chief Policy Economist, **Fujitsu**
Naoko Saito, Senior Vice President, **ProLogis**
Kiyosuke Sugioka, Head of Alternative Investments, **Orix Life Insurance**
Midori Suzuki-Tsushima, Executive Manager, **Tosei Asset Advisors**
Shusaku Watanabe, ~~Managing Director, Head of Japan Real Estate~~ **Director of Capital Transactions, Real Estate, Asia Pacific, Nuveen Real Estate**

Monday 14th September 2020 Venue: Online (All times are based on JST/UTC+9)

1100 Birds of a feather

"Birds of a feather" is the virtual equivalent of a breakout or roundtable at a traditional conference, you will be face-to-face with likeminded peers and a specialist moderator to push forward the asset class.

Session: Tokyo LP Networking (LP Only)

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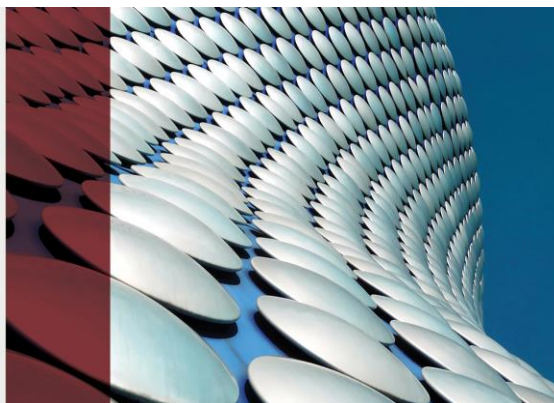
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Wednesday 16th September 2020 Venue: Online (All times are based on JST/UTC+9)

14:00 **Birds of a feather**

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Session: Current trends in fundraising

Thursday 17 September 2020 – Venue: Online (All times are based on JST/UTC+9)

0830 **Tutorial in English**
0830 **Tutorial in Japanese**

***All panels are followed by 20 minute interactive Q&A sessions**

09:30 **PERE welcome**

09:35 **Keynote Panel: Putting Japanese capital to work in global markets during a global crisis**

How can Japanese investors get more comfortable about actively participating in the global real estate markets given the current crisis?

Investing in EU vs. UK in the post Brexit world

The US: is it one market or many? How should Japanese investors look at it in the current context?

Moderator: Arshiya Khullar, Editor, PERE

Speakers: Yasuyuki Sanami, Chief Operating Officer, Diamond Realty Management
Kevin Colket, Founder & CEO, Global Hospitality Investment Group
Mark Elliott, President, Hodges Ward Elliott

10:20 **Panel: Real Estate opportunities beyond core sectors during Covid-19**

Understanding mid-market investing opportunities

Value add and Opportunistic funds, should Japanese investors be taking a closer look?

How has the current crisis impacted these sectors?

Moderator: Christie Ou, Reporter, PERE



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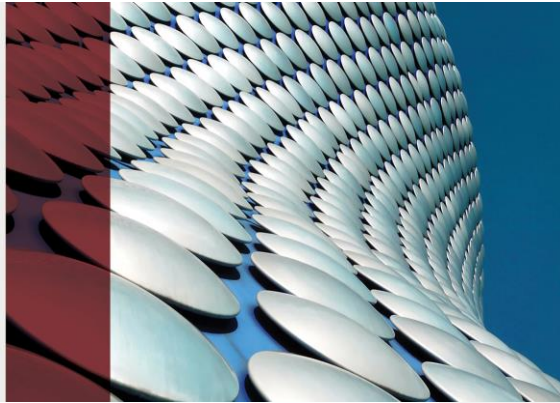
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Speakers: Laurent Jacquemin, Head of Asia-Pacific, AXA IM Real Assets
Kunihiko Okumura, LaSalle Investment Management
Shusaku Watanabe, ~~Managing Director, Head of Japan Real Estate~~ ~~Director of Capital Transactions, Real Estate~~, Asia Pacific, Nuveen Real Estate

11:05 **Birds of a feather**

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Session 1: Risk Management and Covid-19	Session 2: Emerging real estate growth sectors	Session 3: Co-investing
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11:35 **Keynote Presentation: Post-Covid: Who is ready for the new normal?**

Speaker: Martin Schulz, Chief Policy Economist, Fujitsu

12:05 **Panel: Current investing trends in the Japanese market in context of the pandemic**

Japan Post - Covid 19 – What are the most important themes for investors?
How has the coronavirus impacted the market?

Why are investors increasingly interested in the residential sector?

Moderator: Tetsuya Fujita, Country Manager, CBRE Global Investors Japan

Speakers: Harumi Kadono, Head of Fund Management Department and Managing Director, IDERA

Daisuke Kitta, Senior Managing Director, Head of Japan, Blackstone

Toshio Fukushima, President and Representative Director, Daiwa Real Estate Asset Management

Shin Takahashi, Executive Managing Director, Mori Trust

12:50 **Birds of a feather**

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Session 1: US Real Estate	Session 2: European Real Estate	Session 3: Asian Real Estate
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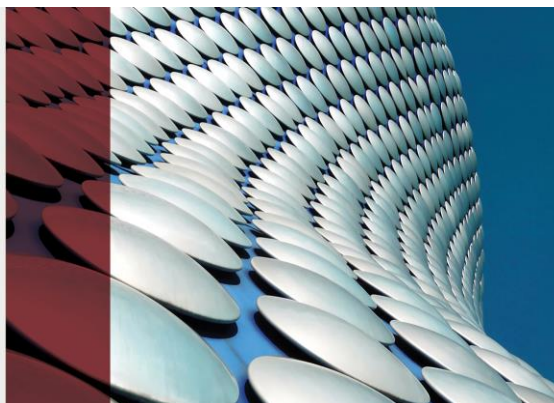
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13:50 **Panel: Real estate debt – a winning sector in times of uncertainty?**

Debt vs Equity – for the Japanese investor, what is best now and why?
Debt opportunities – USA vs EUR vs Japan vs elsewhere such as Australia
Senior vs. Mezzanine – for the Japanese investor, what are the pros and cons?
Moderator: Ari Druker, Director, Loan Origination - Real Estate, Investment Banking Coverage, Deutsche Securities
Speakers: James Haines, General Manager, Aozora Bank
Shai Greenberg, Senior Vice President, Genkai Capital Management
Philip Ryan, Vice President, Tokyo Star Bank

14:30 **Presentation: Overview of the Japanese Office Market**

Speaker: Tokokazu Imazeki, Ph.D., Chief Analyst, Sanko Estate

15:00 **Birds of a feather**

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Session 1: PropTech

Session 2: Tokyo Real Estate

Session 3: Exit Strategies

15:30 **Panel: Investing in sector specific vs diversified funds**

Understanding the pros and cons to investing sector specific vs diversified funds
Japanese LPs have shied away from sector specific funds, why should they reconsider them?

Overview of sector specific investing opportunities such as in residential, logistics and senior housing

Moderator: Charles Haase, Managing Director, Client Relationship Management, Aetos Japan

Speakers: Naoko Saito, Senior Vice President, ProLogis
Barry Hirschfeld, President & CEO, Asia Investment Partners
Matt Dimond, Managing Director, Mayfair Capital Investment Management



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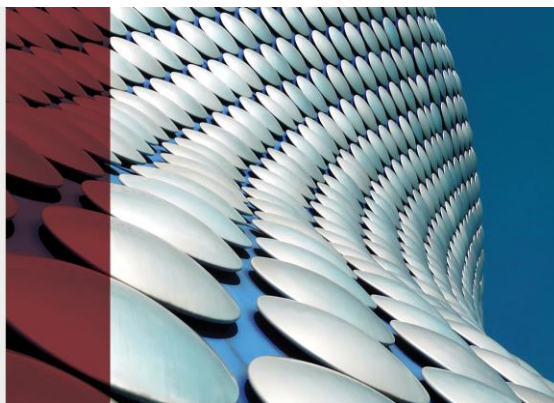
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16:15 **Panel: What do Japanese LPs want? The secrets to relationship building in Japan in the Covid-19 era**

How do more experienced LPs evaluate their RE portfolio of investments so far?
How has the crisis affected the LP/GP relationship dynamic?

LP Scorecard: How do LPs assess their current relationships with GPs so far?

Moderator: Mitsuhiro Arakawa, Executive Consultant, Russell Investments

Speakers: Akihisa Hoshino, Deputy General Manager, Investment Management Department, Sumitomo Mitsui Trust Bank

Takeshi Ito, Senior Investment Officer & Chief Operation Officer, AISIN Employees' Pension Fund

Kiyosuke Sugioka, Head of Alternative Investments, Orix Life Insurance

Shinji Kawano, Head of Overseas Property Investment, Tokio Marine Asset Management

17:00 **Birds of a feather**

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Session 1: VIP & LP

Session 2:

Session 3:

Lounge

Session 4:

Session 5:

18:10 **Close of conference**

1-2-1 Video meetings are available until 18th September

Online networking and on demand content is available until the end of February 2021



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