

PERE

Investor Forum Seoul 2019



PERE Investor Forum: Seoul

20 November 2019 | The Westin Chosun, Seoul

The **PERE Investor Forum: Seoul** is **Asia's leading outbound real estate investing event**. Now in its sixth year, the Forum has a proven track-record of bringing together leading Asian investors with global fund managers – connecting capital with global private real estate investment opportunities. Join us to meet the most active Korean LPs in global real estate, discuss and debate the key trends driving outbound capital flows, and discover the most sought-after investment opportunities for next years across Asia, Australia, US and Europe as well as the latest strategies and most promising asset classes.

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Confirmed Speaking Organisations

- **BlackRock**
- **CapitaLand Investment Management**
- **Global Hospitality Investment Group (GHIG)**
- **QIC (Queensland Investment Corporation)**
- **Samsung Fire & Marine Insurance**
- **Wingate**
- ...

Tuesday 19 November 2019

1900 **Opening Cocktails for LPs, Subscribers and Sponsors (by invitation only)**

Wednesday 20 November 2019 – Global trends & global markets

0800 **Registration and networking refreshments**

0855 **Welcome from the Chairperson**

0900 **Opening keynote panel: Latest trends in global real estate and capital flow - an LP and GP discussion**

- What are the latest capital flow movements and macro trends?
- What attractive yields are out there for the Korean institutionals?
- Dynamic questions and answers round, driven by PERE's editorial team

0945 **Keynote GP address**

1015 **Networking and Coffee Break**

1045 **LP Panel**

- What are great strategies when it comes to portfolio diversification?
- Capital owner perspectives and the recent co-investment rise
- Exit strategies: often overlooked?

1130 **Discussion: When is capital going to flood back into Asia?**

- Will current outbound trends continue or are we on the brink of capital flow change?



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- What markets will profit most?
- What asset class promises highest yields in both developed and emerging Asia?

1200 **Networking lunch**

1330 **All eyes on Europe – Where is room to grow?**

- Korean investments of \$8.4bn in income-producing assets and development sites abroad and three-quarters of this went to Europe, up from 59% in 2017. (RCA)
- What are opportunities in top-tier cities as London and Paris, as well as promising strategies in Central Europe?

1420 **Hot topic: Alternatives within Alternatives**

- Hospitality, storage, co-living, etc – What offers the best opportunities, from a yield, regional and demographic perspective?
- Changing demographic and generational purchasing behaviours
- Will the expertise come from established players?

Speakers:

Kevin Colket, Founder and CEO, Global Hospitality Investment Group (GHIG)

1500 **Networking Break**

1530 **All quiet on the western front? – US opportunities now and in five years**

- What are smart strategies to battle hedging costs and the late-cycle environment?
- What locations are worth keeping an eye on? And what classes will offer promising yields in the long run?

1615 **Real estate debt – Latest strategies in a hot asset class**

- What are the best RE debt strategies in Europe, Americas, Asia and Australia? And what are the opportunities with China deleveraging?
- What are the risks and returns across the capital stack?
- Who are the right partners to trust?

Speakers:

James Lim, CEO, CapitaLand Investment Management

1700 **Closing LP Keynote**

1730 **Chairperson's closing remarks followed by cocktail reception**



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