

Private Debt
Investor

Seoul Forum 2020

The 3rd annual Seoul Forum will continue to connect Korea's most active LPs and allocators with global fund managers. The PDI Forum will cover private debt investment across global markets, as well as in-depth sessions on the strategies and sectors. [Virtual experience](#) is now available offering limitless cross-border access to the global private debt's most influential community and 5 days' unlimited virtual private meeting from 9 – 13 November. On-demand content, attendee list and direct messaging are available until the end of 2020.

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Seoul Forum 2020

Featured speakers and organisations:

- BK Cheon, Chief Investment Officer, **DGB Life Insurance**
- Kipp deVeer, Director, Partner, Head of Credit Group, **Ares Management Corporation**
- Nicole Douglas, Head of Investor Research, **PEI Media**
- Jiroo Eoh, Team Head, **ABL Life Insurance**
- Jayme Han, Director, Funds Advisory – Asia Pacific, **JLL**
- Mark Jenkins, Managing Director and Head of Global Credit, **The Carlyle Group**
- Janghwan Lee, Managing Director, Head of Financial Investment, **Lotte Insurance**
- Jin Won Lee, General Manager, **Local Finance Association**
- Dalit Nuttall, Principal, **West Valley Capital**
- Carol Lee Park, Managing Director, **CLSA Capital Partners (HK)**
- Wonjoon Park, CEO, **DS Networks Asset Management**
- Robert Petty, Co-CEO and Co-CIO, **Fiera Capital**
- Greg Racz, Co-founder & President, **MGG Investment Group**
- David Ross, Managing Director, **Northleaf Capital**
- Andrew Shin, Director & Head of Investment Services, **Willis Towers Watson**
- Thomas Swain, Director, **Credit Suisse Private Fund Group**
- Edward Tong, Managing Director, Head of Private Debt Asia, **Partners Group**
- Speaker TBC, **Proskauer**

Private Debt Investor Seoul Forum 2020

Virtual event KST / UTC +9

Interactive content: 10 November

Private virtual meetings go live: 9-13 November 6.00-23.59

Extended networking: until the end of December 2020

9 November 2020 (Monday)

6.00 Platform opens for private meetings

14.00 Welcome to the PDI Japan Korea Week, Tutorial and followed by
Birds of a feather

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“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: Will fundraising ever be the same again? How to adapt post-pandemic

15.00 Mixer networking and private meetings

10 November 2020 (Tuesday)

Virtual event - All timings are based on KST / UTC +9

8.00 **Tutorial in English**

8.00 **Tutorial in Korean**

9.00 **Welcome from PDI**

9.10 **Keynote: Ares: Is the impending downturn the greatest opportunity or greatest challenge that private debt as an asset class has ever known?**

- What are the impacts that the pandemic and subsequent downturn will have on competition within the private debt market?
- Why is private debt attractive for investors relative to other asset classes?
- What changes have we seen to investor and manager behaviour in anticipation of the correction?

Speaker: Kipp deVeer, Director, Partner, Head of Credit Group, **Ares Management Corporation**

Followed by live Q&A with the speaker

9.40 **Panel: LP and GPs take a view on the next decade for private debt**

- What is fuelling the rise in global private debt?
- What are the key learnings from the covid-19 crisis?
- Which private debt strategies have emerged well in the face of covid-19 and which have suffered?

- What are leading GPs and LPs predicting for the next decade?
- Will ESG investing be the new norm?

Moderator: Dalit Nuttall, Principal, **West Valley Capital**

Speakers:

Janghwan Lee, Managing Director, Head of Financial Investment, **Lotte Insurance**

Greg Racz, Co-founder & President, **MGG Investment Group**

David Ross, Managing Director, **Northleaf Capital**

Followed by live Q&A with the speakers

10.20 **Panel: Emerging from chaos: Is the US mid-market still driving exceptional returns?**

- What does the mid-market direct lending market look like now?
- Major strategies and regions providing exceptional returns
- Incentives and deterrents to deploy capital

Followed by live Q&A with the speakers

11.00 **Birds of a feather: Networking group discussions**

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Session 1: US market

Session 2: Senior debt

Session 3: Mezzanine

11.30 **Panel: Risk vs reward: Do China and India’s private credit markets align with Korean LP investment mandates?**

- What is the outlook for private debt in China and India in a time of crisis?
- What are the remaining differences between the China and Indian markets?
- What role does regulation and standardisation have to play?
- Which credit strategy will gain more traction from Q4 onwards?

Followed by live Q&A with the speaker

12.00 **Panel: Korean LPs cut to the chase: How committed are they to private debt and to building new private credit manager relationships?**

- How do LPs currently view private debt?
- Are LPs prepared to commit to funds without seeing managers face to face? How does restricted travel affect LP / GP relationships?
- What are the most pressing challenges facing asset allocations?
- What do Korean investors want from their global fund managers and local asset managers?

Moderator: Andrew Shin, Director & Head of Investment Services, **Willis Towers Watson**

Speakers:

BK Cheon, Chief Investment Officer, **DGB Life Insurance**

Jin Won Lee, General Manager, **Local Finance Association**

Followed by live Q&A with the speakers

12.40 **Birds of a feather: Networking lunch discussions**

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Session 1: Direct lending Session 2: Co-investing Session 3: LP Lounge

14.00 **Panel: What is driving investors to commit to Asia’s credit markets?**

- Opportunities and key challenges ahead for private debt in Asia
- What should investors be aware of when approaching different markets across Asia?
- How are different managers approaching open-ended and closed-ended vehicles and what are potential considerations for each?
- What are the opportunities at the larger end of the market? How does it differ in type and attractiveness with more mid-market plays?

Moderator: Thomas Swain, Director, **Credit Suisse Private Fund Group**

Speakers:

Carol Lee Park, Managing Director, **CLSA Capital Partners (HK)**

Robert Petty, Co-CEO and Co-CIO, **Fiera Capital**
Edward Tong, Managing Director, Head of Private Debt Asia, **Partners Group**

Followed by live Q&A with the speakers

14.40 **Panel: Prepare to ride the wave of distressed and special situations**

- Where are the opportunities in the enormous market?
- How can distressed funds make the current environment work for them?
- Will there be a growing appetite in the post-downturn world?

Moderator: Wonjoon Park, CEO, **DS Networks Asset Management**

Followed by live Q&A with the speakers

15.20 **Panel: Navigating a hard contraction - European mid-market lending**

- What does the mid-market direct lending market look like now?
- Major strategies and regions providing exceptional returns
- Incentives and deterrents to deploy capital

Followed by live Q&A with the speakers

15.30 **Birds of a feather: Networking discussion groups**

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**Session 1: Data Download:
Highlights from Private Debt
Investor’s LP Perspectives Study**

**Session 2:
Europe market**

**Session 3: Distressed &
special situations**

16.00 **Panel: Alternative alternatives: Real asset debt in focus**

- Opportunities seeing in real asset debt and specialty finance
- Risks and returns compare to corporate debt
- Why real asset debts fit into a mixed asset portfolio or something else?

Moderator: Jayme Han, Director, Funds Advisory – Asia Pacific, **JLL**

Speaker:
Jiroo Eoh, Team Head, **ABL Life Insurance**

Followed by live Q&A with the speakers

16.40 **Keynote: Carlyle on the future of global private debt investment**
Speaker: Mark Jenkins, Managing Director and Head of Global Credit, **The Carlyle Group**

17.10 Closing remarks

17.20 **Birds of a feather: Networking discussion groups**

“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 – through live polls during the day, you decide what the topics will cover!

Session 1:

Session 2:

Session 3:

17.20 ***Private virtual meetings open until Friday 13th November, networking continues until 31st December 2020***

The agenda is subject to change.