

Private Debt
Investor

Japan Korea Week 2022

PDI Seoul Forum

Tuesday 8 November 2022, Fairmont Ambassador Seoul

Connecting South Korea's investors and global private debt leaders

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- 8:00 *Registration and networking breakfast*
- 9:00 *Welcome from PDI and opening remarks*
- 9:10 **Opening panel: Private credit: Moving to post pandemic investing opportunities**
- Has 2022 been a game changing year for private debt fund managers?
 - Given the interest rate hike, inflation and Fed's tightening stance, have there been preference shifts in tranches? What are the top findings from global investor sentiment?
 - Which strategies are proving resilient or "all weather", regardless of the business cycle or economic climate?
- Moderator: Alex Lynn, Hong Kong Bureau Chief, **PEI Media**
Speakers:
Chris Semple, Partner, **Crestline Investors**
Greg Racz, Co-founder and President, **MGG Investment Group**
David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- 10:00 **Keynote panel: The growth of ESG in private debt markets**
- How has the private debt space responded to the increased emphasis on ESG factors?
 - What are the top ESG priorities – DE&I, climate, data, transparency, other matters?
 - How do managers tackle ESG challenges such as lack of ESG data availability?
 - Is impact investing the next level of ESG in private debt?
- Speakers:
Jin Suk Choi, Head of Sustainable Investment Team, **Korea Investment Corporation**
Chantale Pelletier, Global Head of Infrastructure, **Schroders Capital**
Jeff Pentland, Managing Director, **Northleaf Capital Partners**
- 10:40 *Networking break*
- 11:10 **Keynote presentation**



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- 11:40 **Korean investor panel: View from the Top [Korean session]**
- How do LPs view the private markets developing in 2023?
 - What are the pros and cons of going private debt vs alternative asset classes?
 - How can the investment team balance the demands for increased yield from the portfolio with risk?
- Moderator: WanSun Park, Head of Alternative Investment Team, **Fubon Hyundai Life Insurance**
Speakers:
Jiroo Eoh, Team Head, **ABL Life Insurance**
Byung Kyu Cheon, Chief Investment Officer, **DGB Life Insurance**
- 12:30 *Networking luncheon*
- 13:45 **Panel: The US and Europe market landscape**
- Spotlight on the middle market direct lending in the US and Europe: How has the dynamic evolved in the past year? How did managers tackle challenges such as economic hurdles, the threat of rising interest rates and possible liquidity risks?
 - Where do the pockets of opportunities lie when comparing the upper and lower market?
 - How are fund managers differentiating themselves in terms of fundraising and portfolio management?
- Moderator: Deborah Ogawa, Senior Director, **Fitch Ratings**
Speaker: Antonella Napolitano, Managing Director, **Deerpath Capital Advisors**
- 14:30 **Panel: Where do private credit opportunities lie in the new era?**
- What are the drivers and trends for the alternative credit strategies?
 - The growth of specialty finance, collateralized loan obligations (CLOs), asset-backed securities (ABS) and niche strategies for opportunistic investors
 - Examining the emerging asset classes, sectors, developed vs emerging market
- Moderator: Jayme Han, Managing Director and Head of Asia ex-Japan, **Pretium Partners**
Speakers:
Ryan Chung, Managing Director and Head of Principal Investment, **Huatai International**
Andre A. Hakkak, Chief Executive Officer and Co-Founder, **White Oak Global Advisors**
- 15:10 *Networking break*



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- 15:40 **Panel: Uncovering the secret sauce of investment due diligence in South Korea [Korean session]**
- What are new tactics for gatekeepers to deal with Korean investors?
 - What advice would asset managers give to investors who are just entering private debt investment world?
 - What do Korean investors want from fund managers or local placement agents?
- Moderator: Taehyun Yeom, Principal, **HarbourVest Partners**
- Speakers:
Jungik Cho, Head of Alternative Investment Solutions, **Mirae Asset Securities**
Woong Hwang, Head of Alternative Investments Solution Department, **Kyobo Securities**
Sunkyung Lee, Managing Director, **PineStreet Asset Management**
Eugene So, Head of Global Alternative Investment Department, **IBK Securities**
- 16:20 **Panel: Korean investor appetite for private debt [Korean session]**
- Where does corporate debt, real estate debt and infrastructure debt sit in LPs' portfolios?
 - Any sectors or strategies that are outperforming expectations?
 - What attributes do institutional investors look for when choosing cross-border private debt managers?
- Moderator: Andrew Shin, Head of Investments (Korea), **Willis Towers Watson**
- Speakers:
Harold Dong Young Kim, Manager, Private Capital Team, **TongYang Life Insurance**
Rok Kim, Senior Manager, **The Korean Teachers' Credit Union**
Yoonsuk Oh, Investment Manager, Alternative team, **National Federation of Fisherise Cooperatives**
- 17:00 *Closing remarks and networking cocktail*