

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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PDI Seoul Forum

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Tuesday 8 November 2022, Fairmont Ambassador Seoul

- 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:
Frank Jordan, Partner, **Crestline Investors**
Greg Racz, Co-founder and President, **MGG Investment Group**
David Ross, Managing Director & Head of Private Credit, **Northleaf Capital Partners**
- 9:50 **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**
- 10:30 *Networking break*
- 11:00 **Keynote presentation**



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11:40

Panel: View from the Top [Korean session]

- Which developed or emerging markets offer the most potential for returns?
- Will debt overtake bond or equity in short term or long-term portfolio?
- How can the investment team balance the demands for increased yield from the portfolio with risk?
- What attributes do institutional investors look for when choosing cross-border private debt managers?

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

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: On the minds of future leaders [Korean session]**
- How do LPs view the private markets developing in 2022-2023?
 - Are there any significant private debt trends and how does these impact return expectations?
 - Where does corporate debt, real estate debt and infrastructure debt sit in LPs' portfolios? Any sectors or strategies that are outperforming expectations?
 - What pieces of advice for those who established themselves in the industry?
- 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*



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