

Day One: 4 December

8:00-9:00

Coffee & registration

8:00-09:00

LP Breakfast Roundtable

Discuss key challenges with the shifting landscape of organizational expense obligations over breakfast with other LPs as part of an off-the-record, facilitated group conversation hosted by ILPA.

Holly Makarchuk, Relationship Manager, ILPA

Teia Merring, Senior Investment Director, USS

Helena Threlfall, Portfolio Manager - Environmental Opportunities, **Local Pensions Partnership.**

9:10

Chairs opening address

Laurie Mahon, Senior Advisor, Infrastructure Markets

9:15

Fireside chat: The Future of London as a Global Financial Centre Catherine McGuinness CBE CC, Past Chair, City of London's Policy & Resources Committee

Dame Julia Hoggett, Chief Executive Officer, London Stock Exchange

9:45

Diversity dialogue: the role of senior leaders in driving systemic change

- Strategies for benchmarking gender diversity progress and establishing meaningful metrics
- How can you eliminate unconscious bias in your diversity and inclusion initiatives?
- Exploring the impact of mentorship and sponsorship programs and what works well
- Tips for success in private markets

Moderator: Denise Gibson, UK Managing Partner, Executive Committee Member, **A&O Shearman**

James Brocklebank, Managing Partner, Advent International Gurpreet Manku, CEO, Level 20

Deborah Zurkow, Global Head of Investments, AllianzGI

Antje Hensel-Roth, Board Member and Chief People and External Affairs Officer, **ICG Gwenola Chambon**, CEO-Managing Partner, **Vauban Infrastructure Partners**

For program information: **Charles Gould** charles.g@pei.group

For sponsorship opportunities: **Chris Wagland** <u>chris.w@pei.group</u>



10:30

State of the union: investor sentiment in the current environment

- Is the environment for fundraising, deals and exits improving?
- Sectors and strategies that have prospered in a more challenging environment
- What new types of liquidity options are managers utilising?
- Exploring reasons for optimism for the next year

Moderator: Alexandra Davidson, Global Head of Funds & Investment Management, **Clifford Chance**

Teia Merring, Senior Investment Director, USS

Vanessa Shia, Head of Private Markets, London CIV

Michela Bariletti, Chief Credit Officer, The Phoenix Group

Gillian Evans, Managing Director - Client Solutions Group, Macquarie Asset

Management

11:15

Networking Break

Specific areas for networking

Women in Infrastructure Forum London 2024	Women in Private Equity Forum London 2024	Women in Real Estate Forum London 2024	Women in Private Debt Forum London 2024
11:55	11:55	11:55	11:55
Opening remarks	Opening remarks	Opening remarks	Opening remarks
Laurie Mahon, Senior	Gurpreet Manku, CEO,	Gila Cohen, Partner,	Sabrina Fox, CEO,
Advisor, Infrastructure	Level 20	Chief Investment Officer,	European Leveraged
Markets		Vanbarton Group	Finance Association
12:00	12:00	12:00	12:00
The state of play in	The state of play in	The state of play in real	The state of play in
infrastructure:	private equity: finding	estate: outlining the top	private debt: Evaluating
prospering in a more	opportunities in today's	strategic priorities in	the through-the-cycle
challenging	market	today's market	value of the asset class
environment	- Identifying emerging	- How to tackle the 2-	
	sectors and	trillion wall in global	- Where are we now in
	geographic regions	real estate debt	the cycle?
	with promising	- Finding opportunities	- With the higher rates
	growth potential	amid a profound shift	what is the impact on
			borrower appetite- is

PERE

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Private Debt Investor

Women in Private Markets Summit London 2024

- Why will infrastructure prove a safe and enticing haven for investors in a challenging
- What does recent consolidation mean for the asset class? Is this a sign of things to come?
- What is the next frontier for infrastructure?

investment environment?

Moderator: Amy Mahon, Partner, Global Co-Head of Energy and Infrastructure, **Simpson Thacher & Bartlett** Assia Belkahia, Partner, Antin **Infrastructure Partners Pilar Banegas**, Partner, Fund Management, **InfraRed Capital Partners** Cristina Gonzalez Managing Director, KKR Irini Kalamakis, Senior Managing Director & Global Head of Strategic Partnerships, OMERS Infrastructure Roopa Murthy, Partner, Head of a Europe, Infrastructure Debt, Ares Management

- How are managers leveraging technology and data analytics to drive returns?
- Discussion around market innovations that managers are employing

Moderator: Christy
O'Connell, Counsel,
Cleary Gottlieb
Mirja Lehmler-Brown,
Partner, Hayfin
Rhonda Ryan, Partner,
Head of European Private
Equity, Mercer
Joe Topley, Chief
Executive Officer, GBL
Capital
Jenny Newmarch, Head
of Private Equity, Aware
Super

- in the real estate landscape
- Assessing the most attractive markets and investment strategies in Europe and beyond

Moderator: Isabel
Berger, Partner, Gibson
Dunn
Jenny Hammarlund,
Senior Managing
Director, OTPP RE
Europe
Mai-Lan de Marcilly,
Managing Director, KKR
Christine Fritz, Co-Senior
Portfolio Manager, PGIM
Real Estate
Ioanna Paschalidou,
Managing Director,
Henderson Park

- there enough dealflow?
- How long will the "golden era" of private credit continue?

Moderator: Isabella Mashru, Partner, Clifford Chance **Christine Vanden** Beukel, Managing Director, Crescent Credit Europe Jennifer Hartviksen Managing Director, Head of Global Credit, **IMCO** Catalina Stoica, Principal, Head of Co-Investment, **Park Square Capital Sophia Alison**, Head of Direct Lending EMEA, **Macquarie Asset** Management Andrea Fernandez, Partner, Head of Product Management and Investor Relations, European Credit and Corporate Secondaries, **Ares Management**

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Women in Private Markets Summit

London 2024

12:40

Exploring the potential and roadblocks in digital infrastructure investments

- How digital infrastructure is faring in the high inflation and interest rates era
- Navigating the roadmap for sustainable digital infrastructure
- What's next for digital infrastructure?

Moderator: Eimear Coady, Partner, A&O **Shearman** Anaïs Triboulet, Director, **DC Advisory** Svetlana Barthelemy, Senior Vice President, GIC Phoebe Smith, Managing Director, **PATRIZIA** Pascale Labrecque, Principal - Investment Management, **Digital Bridge**

12:40

Exploring deal dynamics in the **European PE market**

- Are valuations still too hiah?
- Evaluating whether dealmaking activities are showing signs of recovery
- Identifying hotspots and areas of opportunity

Moderator: Gemma Roberts, Partner, Co-Chair London Office, Goodwin Helene Schutrumpf. Director of IR and Fundraising, **AURELIUS**

Marta Stojanova, Director, S&P Global Sarah Brereton, Partner, Co-Head of Investment, **Keyhaven Capital Partners** Kalyani Harar, Director of Private Investments, Wellington Management

12:40

Investing in alternative real estate strategies including data centres, healthcare, student housing and more

- What is driving increased investor interest in nontraditional sectors?
- Understanding the unique risks associated with investing in alternative real estate strategies and how investors mitigate them
- Identifying operational considerations and potential value creation opportunities within alternative sectors

Moderator: Evelyn Lee, Editor, **PERE** Anne Gales, Partner & Co-Founder. **Threadmark** Roxana Mohammadian-Molina, Chief Strategy Officer, Blend **Investment** Management Ami Kotecha, Co-Founder & President, **Amro Partners** Vivienne Howell, Head of Healthcare, Civitas

12:40

Opportunities for investors in real asset debt

- Is the macro environment pushing investors to diversify their allocation into private infrastructure and real estate credit which has a lower correlation and different cycle?
- What comparative advantages does the private real estate debt market present in contrast to other sectors of corporate credit investment?
- How are managers navigating regulatory frameworks and pressures?

Fiona Treble, Managing Director, Global Head of Membership, AIMA Shivani Goolab, Director, Investec Real **Estate** Nailah Flake, Managing Partner, Brookfield Credit

13:15 Lunch

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Women in Private Markets Summit London 2024



14:15

Investor perspectives on the infrastructure asset class

- Exploring the demand for more complex structure deals
- How infrastructure investors plan to tackle the tailwinds from the increase in interest rates
- Looking into a crystal ball: the future for investor-manager relationships

Moderator: Elisabeth Johnson, Partner, Linklaters Katya Romashkan,

Aware Super Portfolio Manager - Infrastructure,

Aware Super Aurelie Hariton-Fardad, Managing Director,

MetLife Investment Management Tanriverdi Versmissen

Isil, Head of Infrastructure Debt Transactions,

Munich-MEAG Alena Antonava

Investment Manager, **Railpen**

14:15

Investor Panel: Allocating to private equity during uncertain times

- Strategies for mitigating risk and optimizing returns in volatile market conditions
- How are investors dealing with overallocation issues and other challenges?
- Investor views on innovations managers are implementing

Moderator: Barbara
Castellano, Managing
Director, S&P Global
Anna Barath, Chief
Investment Officer, Bite
Investments
Nathalie Chollet, Head
of Circular Economy &
Industrial Resilience |
Equity Investments,
European Investment
Fund

Fund
Cari Lodge, Managing
Director, CF Private
Equity
Charlotte Kierrulff Vice

Charlotte Kjærulff, Vice President, ATP Private Equity Partners

Director Senior Alternative Investments Specialist, **Feri Trust**

Nicole Grützmacher,

14:15

Investors views on investment opportunities in Europe

- What macro and geopolitical factors are impacting the decisions of asset allocators?
- Assessing the attractiveness of various real estate strategies to investors
- Strategies and considerations for LPs to navigate uncertainty and volatility in the European real estate market

Moderator: Omega Poole, Co-founder & Managing Partner, Propela Ventures Anne Koeman-Sharapova, Head of Europe Real Estate Investment, Mercer Anja Ritchie, Managing Director, StepStone Group Francesca Boucard, Head Real Estate Research & Strategy,

Swiss Life Asset

Managers

14:15

Investor views on private credit in the current environment

- What key factors do
 LPs evaluate when
 assessing private
 credit managers and
 their funds?
- To what extent is lack of liquidity impacting direct lenders' fundraising efforts?
- How is liquidity impacting portfolio construction and investment decisions in credit?

Moderator: Kirsten Bode, Co-Head of Private Debt, Pan-Europe, Muzinich & Co Nemashe Sivayogan,

Head of Pensions and Treasury, **London**

Borough of Merton

Dalit Nuttall, Principal,

West

Valley Capital Pravi Prakash

Investment Manager,

Railpen

Sophie Pierce, Senior Associate, Investments,

WTW

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Women in Private Markets Summit

London 2024

14:50

The Infrastructure landscape in 2025 and beyond

- Why is there an abundance of optimism for growth in infrastructure currently?
- Increasing diversification of infrastructure asset types
- Assessing where the boundaries will be pushed to next in infrastructure

Moderator: Alice Brogi, Partner, Gibson Dunn Alice Usanase, Lead, Europe, Middle East & Francophone Africa,

Africa Finance Corporation Kashif Khan, Director, Infrastructure & Project Finance, MetLife **Investment** Management

Natasa Kovacevic. Managing Director, Infrastructure, CPPIB 14:50

Navigating the rise of healthcare investing in private equity

- Is healthcare still primarily a place for specialist investors? What's needed to attract larger pools of capital?
- Which sub-sectors of healthcare are proving most resilient to market turbulence?
- How are investors setting themselves up for success in a complex sector?

Moderator: Shimin Lee Partner, Clifford Chance Annette Clancy, Operational Investor. JEITO Capital Tara Bishop, Founder, **Black Opal Ventures** Katie Beckingham,

Director, August Equity

14:50

Unlocking opportunities: exploring the landscape of real estate debt

- To what extent is this a golden era for real estate debt?
- The rise of the insurance lender in large property markets and the implications for borrowers and lenders
- Strategic opportunities and challenges for investors and lenders

Moderator: Lucy Scott. Deputy Editor, Real **Estate Capital** Laurine Amiel Investment Director, Private Credit, Australian Super Wendy Cai-Lee, CEO and Founder. **Piermont Bank** Prabby Mann, Head of Real Estate, Phoenix Group

14:50

The workings of multi lender unitranche club deals

- How do terms and pricing look for unitranche deals in contrast to syndicated debt?
- How to avoid lender to lender disputes
- Pros and cons of sole lenders vs club deals

Moderator: Romane Guitard, Partner, Augusta & Co Kristina Matthews, Partner, Falcon **Investments** Mina Melik Şentürk, **Financial** Consultant/Board Member, CCN Holding Janine Harion, Managing Director, **Permira Credit**

15:25

Coffee break

15:40

Analysing the emerging stars: Hydrogen, batteries, and EV

15:40

Integrating ESG with value creation

15:40

Decarbonising real estate: driving better long-term financial

15:40

Generating upside from sustainability in private debt

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Women in Private Markets Summit

London 2024

charging in the age of sustainable investing

- **Established** infrastructure or optimistic/value-add? How to correctly define the energy subsectors
- The role the subsectors play to enable the energy transition
- Exploring the sustainability of batteries and EV charging

Moderator: Anne-Louise Petersen, Senior Reporter, Infrastructure Investor **Patricia Rodrigues** Jenner, Member of Infrastructure Investment Committees UK, GLIL & Africa's AIIM Emma Tinker, Cofounder and CIO, Asper Investment Management **Evelina Olago**, Managing Director, Client & Strategy, Just Climate

- How do sustainability strategies increase profitability and sellon value
- To what extent does implementing sustainability increase resilience?
- Case studies from real PE investments

Moderator: Ruth Knox. Partner, Corporate Department, **Paul** Hastings

Elena Mariotti, Managing Director, Head of Sustainability Stewardship, **Cerberus** Capital Management **Joanna Reiss**, Partner

and Co-Head of Impact Investing, Apollo Eimear Palmer, Partner,

Global Head of Sustainability, **Pantheon**

Ventures Miriam Wrobel, Global Head of ESG & Sustainability, FTI

Consulting

performance with sustainability initiatives

- How sustainability initiatives can lead to cost savings, increased property value, and improved return on investment
- Understanding the impact of evolving environmental regulations and building codes on real estate portfolios
- Exploring innovative technologies and strategies for decarbonising real estate portfolios

Moderator: Tzvete Doncheva. Investor Relations Lead, PT1 Diana Louis, Head of Alternative Assets ESG Integration, **MEAG** Hala El Akl, Vice President of Sustainable Investing and Operations, **Oxford Properties**

Group Nick Chee, Senior Associate ESG & Stewardship,

AustralianSuper Abigail Dean, Head of Strategic Insights, Real Assets, **Nuveen**

16:10

Real Estate Case Study

- What are managers doing to create value in their portfolios?
- Does ESG-compliant private debt strategies result in an increased credit quality within the portfolio?
- Should all investments be structured as sustainability linked loans or is it not always suitable for the borrower?

Moderator: Sabrina Fox. CEO, European **Leveraged Finance** Association Wee Kii Teh. Portfolio Manager, **Allianz Global Investors** Rebecca Davis, Senior Investment Director, **European Pension** Practice, Cambridge **Associates** Niamh Whooley, Managing Director, Head of Sustainable Investing, **Pemberton Asset**

Management

16:10 Case Study: **Opportunities in Private**

16:10 **Infrastructure Case** Study

16:10 **Private Equity AI Case**

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Women in Private Markets Summit London 2024

	Lisa Weaver-Lambert, NED, Technology & Data Executive, Independent In conversation with Sabrina Pervez, Director Alternative Assets, Robin Al		Credit in CEE Magdalena Sniegocka, Principal, CVI Dom Maklerski
16:30	16:30	16:30	16:30
The continuing strength of infrastructure debt	Growth and Venture in Europe	Prospering in a more challenging	Is speciality finance ripe with opportunity?
 Identifying strategies for effectively managing risk and liquidity in today's environment Investigating if infrastructure debt will continue to outperform alternative credit strategies What the future holds for investors and borrowers Moderator: Claire Williams, Partner, Simpson Thacher 	 Discussing the various exit strategies available to European venture & growth Analysing the latest funding trends in European startups, Assessing the regulatory environment for venture capital and growth-stage investments in Europe and its implications for investors 	 environment for logistics and industrials Implementing strategies to build resilience against disruptions How does Europe compare with other markets in terms of opportunities for investors? Value creation opportunities from leveraging innovative technologies 	 Why are niche markets so attractive to investors right now? Do higher returns mean higher risk in this segment of the market and are investors being compensated for the risk? Opportunities across ABL, bridge financing, aviation, royalties, NAV financing, litigation finance etc.
Bérénice Arbona , Head	Moderator: Florence	Moderator: Charlotte	Dr. Gabriella Kindert,
of Infrastructure Debt,	Keelson-Anfu, Senior	D'Souza , EMEA editor,	Independent Board
LBPAM	Manager, Private Markets,	PERE	Member, Neptune
Nadine Wagner,	London Stock Exchange	Laurie Lagarde,	Leasing, a.o.
Investment Manager,	Jan Rutherford, Partner,	Managing Director -	Nadine Buckland, CEO,
MEAG	Scottish Equity	Head of EMEA Logistics	Zenzic Capital
Mathilde Ketoff, Deputy	Partners~	Operator Division, CBRE	Adriana Clancy, Partner,
CIO - Head of Debt	Gayatri Sarkar , Founder	Investment	Corbin Capital Partners
Investment, RGREEN	and CEO, Advaita	Management	
INVEST	Capital Agata Nowicka,	Martina Malone, Managing Director,	
	Founder, Managing	Global Head of Capital	
	Deduce Formal Formal	Deising Prologie	

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Partner, Female Foundry

Karen McCormick, Chief

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Raising, **Prologis**

Daniela Gomez, Senior





	Investment Officer,	Associate - Fund	
	Beringea	Management, Realterm	
17:05	17:05	17:05	17:00
Infrastructure Think	Private equity Think	Real Estate Think Tank	Private Debt Think Tank
Tank	Tank: driving diversity		Dalit Nuttall, Principal,
Laurie Mahon, Senior	and advancing your		West
Advisor, Infrastructure	career in private equity		Valley Capital
Markets	Christy O'Connell,		
	Counsel, Cleary Gottlieb		
	-		
	Joanna Roberts,		
	Counsel, Cleary Gottlieb		
	Ferdisha Snagg, Partner		
	elect, Cleary Gottlieb		

17:45-19:15

Sponsorship Opportunity
Close of conference followed by cocktail reception

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Day Two: 5 December

7:30-9:00

Coffee & registration

8:00-9:00

Breakfast Networking Sessions

Workshop A	Workshop B	Workshop C
Key debt finance considerations	Unleashing your Authentic	Merger control in private equity -
for 2025	Leadership in the face of digital	recent trends and insights
Kavita Davis, Partner, Gibson	challenges	Ricardo Zimbrón, Partner, Cleary
Dunn	Edith Lassiat, Mentoring for	Gottlieb
	powerful women, Editions EHL.	Carolina Cury Ricciardi, Associate,
	University of the Self	Cleary Gottlieb
Workshop D	Workshop E	Workshop F
Cracking the Code: Retaining	Exploring the secrets of the	Too Assertive or Not Assertive
Women in Asset Management	Boardroom	Enough: leading with authentic
Candice Richards, CEO +	Fiona Hathorn, CEO, WB Director	authority in a male-dominated
Founder, Moxie		environment
		Cecilie Søndergaard Nielsen,
		Managing Director, Founder, CN8
		Leadership Confidence

9:05

Chairperson's Opening Remarks

9:10

The increased importance of value creation in the current environment

- Considering strategies for value creation in different segments of private markets
- How value creation has changed with higher cost of capital, less transactions, and longer hold periods
- To what extent can AI play a part in value creation and what are funds already doing?
- Case studies of value creation successes in the past 2 years

Moderator: Lisa Weaver-Lambert, NED, Technology & Data Executive, Independent Anne-Laurence Roucher, Deputy CEO, Head of Impact Private Equity & Natural Capital, Mirova

Lu Zhang, Founder and Managing Partner, **Fusion Fund Richa Singh**, Director of Data and Al, **Lexington Partners**

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9:50

PEI Data Presentation Atheetha Bani, Research Manager, PEI Group

10:00

Tips for success: elevating your fundraising to prosper in a challenging environment

- Overcoming challenges in fundraising in the current landscape
- Building effective and resilient fundraising strategies
- Investor perspectives: understanding expectations and building lasting relationships
- Exploring new approaches and technologies for private equity success

Moderator: Erin Sarret, Associate Fellow, Saïd Business School

Daria Litvinova, Head of Investor Relations - Partner, Vauban Infrastructure Partners Amanda Tonsgaard, Partner - Head of Investor Relations, AIP Management Jane Bowes, Managing Director, Threadmark

10:45

Coffee & networking

11:15

Secondaries in focus: how the market continues to evolve and grow

- Analysing the evolving landscape of buyer fees and terms in continuation funds
- Getting LPs comfortably with innovative strategies being employed
- How are the secondary markets in real assets evolving?
- Assessing the true indicators of market health beyond record-breaking fundraises

Moderator: Alex Chauvin, Partner, White & Case

Valérie Handal, Managing Director, HarbourVest Partners
Charlie Walker, Deputy Chief Executive Officer, London Stock Exchange
Tori Buffery, Senior Director, Secondaries, Nicola Wealth

Fahad Shams, Senior Portfolio Manager, Allianz Capital Partners

Casandra Pinamonti, Principal, Infrastructure Secondaries, Ares Management

12:00

Unlocking potential: how democratisation can transform private markets

- To what extent are new investors already reshaping the investment landscape?
- Strategies for managers to leverage the influx of new investors and navigate evolving market dynamics
- Assessing the role of regulatory reforms in expanding access and fostering investor confidence
- Exploring the emergence of innovative structures such as long-term asset funds

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Moderator: Sabina Comis, Partner, Dechert

Caroline Heinrichs, Investment Solutions, Perpetual Investors

Olivia Kebble, Associate Principal, Moonfare

Claire Madden, Founder & Managing Partner, Connection Capital

Ana Kekovska, Global Head of Corporate Services, Gen II

12:40

Private Markets Investment Committee

Two managers will present an investment case studies in this exclusive, data-driven and interactive format. Hosted by two experts, you'll have the chance to ask questions, share your thoughts and vote on whether you would invest

Irina Frolova-Vernède, Independent Non-Executive Director, Chair Investment Committee

Elizabeth Weymouth, Founder & Managing Partner, Grafine Partners

13:00

Lunch and room set (Future Leaders arrive for future leaders' session)

Sponsored opportunity
Senior Leaders Lunch

14:00

Inaugural Future Leaders Session

A unique opportunity for the next generation to connect and discuss career advancement strategies. Hosted by esteemed industry leaders, this session will offer invaluable insights and guidance to help you navigate your career path. Engage in dynamic discussions, ask questions, and gain the knowledge and inspiration needed to advance in alternatives. Join us for this empowering experience and take the next step in your professional journey.

Keynote Speaker: **Deborah Zurkow**, Global Head of Investments, **AllianzGI**

15:30

Close of conference

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