

Women in Private Markets Summit London 2024

Women in Private Markets Summit

4 - 5 December 2024 | 133 Houndsditch, London

The world's leading investment event for women in alternatives

Day Zero:

3 December

18:30-20:30

Icebreaker Cocktail Reception hosted by

CLEARY GOTTLIEB

Join us for an evening of networking at pre-event cocktail reception. This gathering offers a relaxed atmosphere for attendees to meet, mingle, and forge connections before the conference begins. Enjoy delightful refreshments and engaging conversations, setting the stage for meaningful relationships throughout the summit.

Day One:

4 December

08:00-09:00

Coffee & registration and meet and greet networking activity

08:00-09:00

LP Breakfast Roundtable

Discuss key challenges over breakfast with other LPs as part of an off-the-record, facilitated group conversation hosted by ILPA

Holly Makarchuk, Relationship Manager, **ILPA**

09:10

Chairs opening address

Laurie Mahon, Senior Advisor, **Infrastructure Markets**

09:15

Keynote interview: The Future of London as a Global Financial Centre

Catherine McGuinness CBE CC, Past Chair, **City of London's Policy & Resources Committee**

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

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- Tips for success in private markets

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

James Brocklebank, Managing Partner, **Advent International**

Gurpreet Manku, CEO, **Level 20**

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





Teia Merring, Senior Investment Director, **USS**

Aoifinn Devitt, Chief Investment Officer, **London LGPS**

11:15

Networking Break

Specific areas for networking

|  <p>Women in Infrastructure Forum London 2024</p> |  <p>Women in Private Equity Forum London 2024</p> |  <p>Women in Real Estate Forum London 2024</p> |  <p>Women in Private Debt Forum London 2024</p> |
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| <p>11:55 Opening remarks Laurie Mahon, Senior Advisor, Infrastructure Markets</p> | <p>11:55 Opening remarks Gurpreet Manku, CEO, Level 20</p> | <p>11:55 Opening remarks Gila Cohen, Partner, Chief Investment Officer, Vanbarton Group</p> | <p>11:55 Opening remarks</p> |
| <p>12:00 The state of play in infrastructure: prospering in a more challenging environment</p> <ul style="list-style-type: none"> - Why will infrastructure prove a safe and enticing haven for investors in a challenging investment environment? - What does recent consolidation mean for the asset class? Is this a sign of things to come? | <p>12:00 The state of play in private equity: finding opportunities in today's market</p> <ul style="list-style-type: none"> - Identifying emerging sectors and geographic regions with promising growth potential - How are managers leveraging technology and data analytics to drive returns? - Discussion around market innovations that | <p>12:00 The state of play in real estate: outlining the top strategic priorities in today's market</p> <ul style="list-style-type: none"> - How to tackle the 2-trillion wall in global real estate debt - Finding opportunities amid a profound shift in the real estate landscape - Assessing the most attractive markets and | <p>12:00 The state of play in private debt: Evaluating the through-the-cycle value of the asset class</p> <ul style="list-style-type: none"> - Where are we now in the cycle? - With the higher rates what is the impact on borrower appetite- is there enough dealflow? - How long will the "golden era" of private credit continue? |

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| <p>- What is the next frontier for infrastructure?</p> <p><i>Moderator: Amy Mahon, Partner, Global Co-Head of Energy and Infrastructure, Simpson Thacher & Bartlett</i> Gwenola Chambon, CEO-Managing Partner, Vauban Infrastructure Partners Assia Belkahia, Partner, Antin Infrastructure Partners</p> | <p>managers are employing</p> <p><i>Moderator: Cleary Gottlieb Mirja Lehmler-Brown, Partner, Hayfin</i> Rhonda Ryan, Partner, Head of European Private Equity, Mercer Joe Topley, Chief Executive Officer, GBL Capital</p> | <p>investment strategies in Europe and beyond</p> <p><i>Moderator: Isabel Berger, Partner, Gibson Dunn</i> Jenny Hammarlund, Senior Managing Director, OTPP RE Europe</p> | <p><i>Moderator: Isabella Mashru, Partner, Clifford Chance</i> Christine Vanden Beukel, Managing Director, Crescent Credit Europe Jennifer Hartviksen, Managing Director, Head of Global Credit, IMCO</p> |
| <p>12:40 Exploring the potential and roadblocks in digital infrastructure investments</p> <ul style="list-style-type: none"> - 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? <p><i>Moderator: Senior representative, A&O Shearman</i> Anais Triboulet, Director, DC Advisory Svetlana Barthelemy, Senior Vice President, GIC</p> | <p>12:40 Exploring deal dynamics in the European PE market</p> <ul style="list-style-type: none"> - Are valuations still too high? - Evaluating whether dealmaking activities are showing signs of recovery - Identifying hotspots and areas of opportunity <p><i>Moderator: Gemma Roberts, Partner, Co-Chair London Office, Goodwin Helene Schutrumpf, Director of IR and Fundraising, AURELIUS</i> Marta Stojanova, Director, S&P Global</p> | <p>12:40 Investing in alternative real estate strategies including data centres, healthcare, student housing and more</p> <ul style="list-style-type: none"> - What is driving increased investor interest in non-traditional 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 <p>Anne Gales, Partner & Co-Founder, Threadmark Roxana Mohammadian-Molina, Chief Strategy Officer, Blend Lisa Feifer, Head of Investor Relations, Civitas Investment Management Ami Kotecha, Co-Founder & President, Amro Partner</p> | <p>12:40 Opportunities for investors in real asset debt</p> <ul style="list-style-type: none"> - 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? <p>Fiona Treble, Managing Director, Global Head of Membership, AIMA Shivani Goolab, Director, Investec Real Estate</p> |
| <p>13:15 Lunch</p> | | | |
| <p>14:15 Investor perspectives on the infrastructure asset class</p> | <p>14:15 Investor Panel: Allocating to private equity during uncertain times</p> | <p>14:15 Investors views on investment opportunities in Europe</p> | <p>14:15 Asset allocation, fundraising and the denominator effect</p> |

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| <ul style="list-style-type: none"> - 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 <p>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</p> | <ul style="list-style-type: none"> - Strategies for mitigating risk and optimizing returns in volatile market conditions - How are investors dealing with overallocation issues, rising interest rates and other challenges? - Investor views on innovations managers are implementing <p>Moderator: Ruth Yang, Managing Director, Global Head of Private Market Analytics, S&P Global Ratings Jenny Newmarch, Head of Private Equity, Aware Super Nathalie Chollet, Head of Circular Economy & Industrial Resilience Equity Investments, European Investment Fund Cari Lodge, Managing Director, CF Private Equity</p> | <ul style="list-style-type: none"> - 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 <p>Anne Koeman-Sharapova, Head of Europe Real Estate Investment, Mercer Deepa Devani, Senior Director, PSP Investments Anja Ritchie, Managing Director, StepStone Group</p> | <ul style="list-style-type: none"> - How do terms and pricing look for unitranche deals in contrast to syndicated debt? - Pros and cons of sole lenders vs club deals - How do LPs view the club approach and perceive club deal making in general? <p>Christine Farquhar, CEO of UK and Europe, Cambridge Associates Nemashe Sivayogan, Head of Pensions and Treasury, London Borough of Merton Dalit Nuttall, Principal, West Valley Capital Pravi Prakash, Investment Manager, Railpen</p> |
| <p>14:50</p> <p>The Infrastructure landscape in 2025 and beyond</p> <ul style="list-style-type: none"> - 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 <p>Alice Brogi, Partner, Gibson Dunn Alice Usanase, Lead, Europe, Middle East & Francophone Africa, Africa Finance Corporation DC Advisory</p> | <p>14:50</p> <p>Navigating the rise of healthcare investing in private equity</p> <ul style="list-style-type: none"> - 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? <p>Moderator: Shimin Lee, Partner, Clifford Chance Rafaèle Tordjman, Founder & CEO, JEITO Capital Tara Bishop, Founder, Black Opal Ventures Katie Beckingham, Director, August Equity</p> | <p>14:50</p> <p>Unlocking opportunities: exploring the landscape of real estate debt</p> <ul style="list-style-type: none"> - 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 <p>Laurine Amiel, Investment Director, Private Credit, Australian Super Wendy Cai-Lee, CEO and Founder, Piermont Bank Prabby Mann, Head of Real Estate, Phoenix Group</p> | <p>14:50</p> <p>The workings of multi lender unitranche club deals</p> <ul style="list-style-type: none"> - 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 <p>Kristina Matthews, Partner, Falcon Investments Mina Melik Şentürk, Board Member, MFM Partners/CCN Holding</p> |

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| 15:25 Coffee break | | | |
| 15:40 Analysing the emerging stars: Hydrogen, batteries, and EV charging in the age of sustainable investing <ul style="list-style-type: none"> - 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 Patricia Rodrigues Jenner , Member of Infrastructure Investment Committees UK, GLIL & Africa's AIIM Emma Tinker , Co-founder and CIO, Asper Investment Management | 15:50 Integrating ESG with value creation <ul style="list-style-type: none"> - How do sustainability strategies increase profitability and sell-on 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, Co-Head of Impact, Apollo | 15:50 Decarbonising real estate: driving better long-term financial performance with sustainability initiatives <ul style="list-style-type: none"> - 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 Hala El Akl , Vice President of Sustainable Investing and Operations, Oxford Properties Group | 15:50 Generating upside from sustainability in private debt <ul style="list-style-type: none"> - 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? 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 |
| 16:10 Infrastructure Case Study | 16:10 Private Equity AI Case Study | 16:10 Real Estate Case Impact Study | 16:10 Private Debt Case Study |
| 16:30 The continuing strength of infrastructure debt <ul style="list-style-type: none"> - Identifying strategies for effectively managing risk and liquidity in today's environment - Investigating if infrastructure debt will continue to outperform alternative credit strategies | 16:30 Growth and Venture in Europe <ul style="list-style-type: none"> - Discussing the various exit strategies available to European venture & growth - Analysing the latest funding trends in European startups, - Assessing the regulatory environment for venture | 16:30 Prospering in a more challenging environment for logistics and industrials <ul style="list-style-type: none"> - Implementing strategies to build resilience against disruptions - How does Europe compare with other markets in terms of opportunities for investors? | 16:30 Is specialty finance ripe with opportunity? <ul style="list-style-type: none"> - 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? |

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| <ul style="list-style-type: none"> - What the future holds for investors and borrowers <p>Bérénice Arbona, Head of Infrastructure Debt, LBPAM Nadine Wagner, Investment Manager, MEAG Nadine Wagner, Investment Manager, MEAG</p> | <p>capital and growth-stage investments in Europe and its implications for investors</p> <p>Jan Rutherford, Partner, Scottish Equity Partners Gayatri Sarkar, Founder and CEO, Advaita Capital Karen McCormick, Chief Investment Officer, Beringea</p> | <ul style="list-style-type: none"> - Value creation opportunities from leveraging innovative technologies <p>Laurie Lagarde, Managing Director - Head of EMEA Logistics Operator Division, CBRE Investment Management</p> | <ul style="list-style-type: none"> - Opportunities across ABL, bridge financing, aviation, royalties, NAV financing, litigation finance etc. <p>Dr. Gabriella Kindert, Independent Board Member, Neptune Leasing, a.o. Nadine Buckland, CEO, Zenic Capital Adriana Clancy, Partner, Corbin Capital Partners</p> |
| <p>17:05 Infrastructure Think Tank over drinks <i>Sponsored opportunity to host</i></p> | <p>17:05 Private Equity Think Tank over drinks <i>Facilitator: Cleary Gottlieb</i></p> | <p>17:05 Real Estate Think Tank over drinks <i>Sponsored opportunity to host</i></p> | <p>17:05 Private Debt Think Tank over drinks <i>Sponsored opportunity to host</i></p> |

17:45-19:15

Sponsorship Opportunity

Close of conference followed by cocktail reception

Day Two:

5 December

7:30-9:00

Coffee & registration

08:00-09:00

Breakfast Networking Sessions

6 concurrent networking Workshops

09:05

Chairperson's Opening Remarks

09:10

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

09:45

PEI Data Presentation

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09:55

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

Daria Litvinova, Head of Investor Relations - Partner, **Vauban Infrastructure Partners**

10:35

Coffee & networking

11:10

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**

11:45

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

Caroline Heinrichs, Investment Solutions, **Perpetual Investors**

Olivia Kebble, Associate Principal, **Moonfare**

Claire Madden, Founder & Managing Partner, **Connection Capital**

12:20

Private Markets Investment Committee

Three hand-picked fund managers will present 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 the transactions in our very own investment committee.

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

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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.

15:30

Close of conference

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