

PDI Seoul Forum | Conrad Seoul

Tuesday 24th June 2025

08:30 **Registration and networking refreshments**

09:00 **PDI welcome and Opening remarks from the Chairperson**

09:10 **Opening panel: The funds driving Korea's push for international portfolios [English]**

- Examine the growth of South Korea's private debt allocation to US and EU funds
- How will markets react to external geopolitical shifts and regulatory cutbacks
- Opportunities for global funds to attract Korean capital seeking greater portfolio diversity
- Understand the strategies gaining rapid attention in a swiftly maturing market

Moderator: **Alex Lynn**, Hong Kong Bureau Chief, **PEI Group**

09:50 **Keynote address**

10:10 **Networking break**

10:40 **Perfectly in balance – the attraction of direct lending's low-risk and evergreen returns [English]**

- Engage with how direct lending's need for revolving credit creates evergreen returns
- The attraction for Korean investors for predictable cash flows
- Explore the individual benefits of sponsored versus non-sponsored deals
- Which markets are proving to have the best risk-return profiles across the direct lending landscape

Moderator: **Dong Hun Jang**, Senior Advisor, **Yulchon**

Panellists:

Kevin Lawi, Managing Director, Private Credit Portfolio Manager and Head of Origination, **UBS**

11:20 **Keynote investor interview: Why Korean LPs prioritizing private credit strategies [Korean]**

Moderator: **Dong Hun Jang**, Senior Advisor, **Yulchon** 12:00 **Networking lunch**

13:15 **Panel: Private credit strategies: Key moves for Korean investors [English/Korean]**

- Discuss with global private debt leaders how they approach their niche
- Better engage with the range of strategies at play in an expanding marketplace
- An allocator's view on what makes for an attractive manager engaging in a particular area
- The risk-reward profiles of different strategies, and the variances between the US and EU

Moderator: **CJ Sparrow**, Director, **Willis Towers Watson**

Panellists:

Johnny Brom, Founder and Chief Investment Officer, **SAIL Investments**

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Seoul Forum

- 14:00 **Presentation: The differing models for specialty finance across selected industries**
- Engage with the burgeoning world of non-traditional lending strategies
 - As transport booms, understand the evolution of shipping and aircraft finance
 - Understand the role of Specialty Finance in supporting entrepreneurs intellectual property
 - How the imposition of new global regulatory regimes will impact regulatory capital
- 14:20 **Panel: Opportunistic credit and how to swiftly take advantage of market events [English / Korean]**
- As market dislocations erupt, how can funds act fast and with fiduciary caution
 - Better understand the niche approaches within the opportunistic credit umbrella
 - Hear why funds are seeing an uptick in opportunistic credit fundraising
 - Consider the most important due diligence steps when reacting to market opportunities
- Moderator: **Yoonsuk David Oh**, Senior Investment Manager, Alternative Investment Team, **National Federation of Fisheries Cooperatives**
- Panellists:
Eun Seok Eugene So, Head of Global Alternative Investment Team, **Sangsangin Investment & Securities**
- 15:00 **Networking break**
- 15:20 **Presentation: PDI's fundraising reports analysis [English]**
Chin Yuen, Research Manager, Asia, **PEI Group**
- 15:40 **Panel: Real asset debt and the attraction of long-term returns [English/ Korean]**
- Why real estate and infrastructure remain a crucial asset class for Korean investors
 - How to access the growing demand for residential real estate
 - The intersection between digital infrastructure and real estate demand
 - Why the prospect of long-term certainty allows for greater short-term risk
- Panelists: **Jay Jae Hyuk Choi**, Director, Head of Alternative Investment / Infrastructure Team, **IGIS Asset Management**
- 16:20 **Closing investor panel: Role of Korean LPs in guiding market development [Korean]**
- How is the present landscape impacting decision-makers' commitment to private debt in terms of scale, strategies and sectors?
 - What is the most important advice for private debt fund managers?
 - What are investors' mid-long term portfolio strategies and key focus in H2 of 2025?
- Moderator: **Seung ki Jeong**, Head of Alternative Investment Team, **Kiwoom Asset Management**
- Panelists:
Seunghye Rachel Kim, Alternative and Equity Portfolio Manager, **AIA Life Korea**
YoungSang Cho, Head of Private Debt Investment Division, **Samsung Asset Management**
- 17:00 **Closing remarks, followed by Cocktail reception**

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