SESSIONS

SUPERRETURN CHINA - 11/05/2021

SuperReturn China

11 - 13 May 2021
BST/UTC+1
Virtual event

Dedicated networking time

07:30 - 08:10
China Day

Chair's welcome address

08:10 - 08:15
China Day

Participants

Frank Su - Managing Director & Head of Private Equity Asia, CPP Investments

Through the investor lens: leading pension fund's view on China PE investments

08:15 - 08:35
China Day

Participants

Frank Su - Managing Director & Head of Private Equity Asia, CPP Investments

The great reset: opportunities in China

08:40 - 09:20
China Day

With China leading the post-COVID rebound and global economy being more separated, how do investors best invest for China coverage? How do GPs view their investments in portfolio companies? What potential opportunities or roadblocks will China's economic reform create?

Participants

Moderator: Fred Hu - Founder and Chairman, Primavera Capital Group

JP Gan - Founding Partner, INCE Capital

Elaine Chen - Partner, PAG

Lin-Lin Zhou - Founder, Managing Partner, Principle Capital

Wei Zhou - Founding Managing Partner, CCV

SPAC: a potential path to democratize VC investing and listing for high growth tech companies — from a practitioner point of view

09:25 - 09:45
China Day

Participants

Jianwei Li - Managing Partner, Zhencheng Capital

Dedicated networking time

09:45 - 10:30
China Day

Connection session: What LPs should and should not concern about when investing in China

09:45 - 10:30
Connections

LP/GP networking session run under the Chatham House Rule. Open to 26 pre-registered LP and GP attendees. To register please email charlene.ho@informa.com

Participants

Ally Zhang - Managing Director, Siguler Guff & Company

Yuan love: cross-border investments

10:30 - 11:00
China Day

Deep dive into cross-border opportunities amidst China's "Dual Circulation" policy, Belt & Road initiatives and capital control. What are LPs' takes on cross-border GPs and considerations amidst de-globalisation and rising protectionism?

Participants

Moderator: Bruno Bensaid - Co-Founder, Shanghaivest

Giuseppe De Filippo - Managing Director, Head of Direct Private Investments, Bank Julius Baer & Co. Ltd.

Lanchun Duan - Managing Partner, Cathay Capital

William Li - Managing Director, Oriza FoFs

Xavier Le Sourne - Partner, Elvinger Hoss Prussen

Finding a high growth company in a low growth environment

11:05 - 11:45
China Day

What is the definition of growth? How do GPs manage valuations and competitions within the growth stage? Why are VCs and buyout GPs expanding their strategies into the growth spaces and what unique opportunities do they see? Will we see more of this trend going forward?

Participants

Moderator: Myron Zhu - Head of Private Markets, Asia, Manulife Investment Management

Jie Gong - Partner, Pantheon

Crystal Li - Partner, GurryShark Capital

Joseph Bergin - Advisor, PSOD and Head, Equity Investment Unit, Asian Development Bank

Wanlin Liu - Managing Director, The Carlyle Group

The rising STAR: will it become the primary IPO destination?

11:50 - 12:10
China Day

Discuss the strengths and constraints of the STAR board: Is it a better exit channel for start-ups? What does the investor base look like? How can USD LPs participate in STAR board? How have the valuations played out?

Participants

Moderator: Hing Wong - Managing Director, Walden International

Jianwei Li - Managing Partner, Zhencheng Capital

Dedicated networking time

12:10 - 12:40
China Day

Hot sector focus - Healthcare investments for healthy returns

12:40 - 13:20
China Day

Will China become a real player for the healthcare industry in the next decade? How is the talent pool different between the US and China? How do China's recent reforms help bring domestic innovation to the global stage?

Participants

Moderator: Lydia Cai - Managing Director and Head of Healthcare, China, TPG

Steven Wang - Partner, OrbiMed

Judith Li - Partner, Lilly Asia Ventures

Weichou Su - Partner & Head of Asia, StepStone Global

Hot sector focus – Consumer or enterprise?

13:25 - 14:05
China Day

Enterprise: What are the risk-return profiles and the sweet spots at different stages of enterprise? Is it now the prime time for enterprise tech and software in China? How to control the valuation hype?

Consumer tech: Is the consumer space in China overheated? How fast can traditional retails adapt to new digital age and shopping habit?

Participants

Moderator: Edward Grefenstette - President, CEO & Chief Investment Officer, The Dietrich Foundation

Kai-Fu Lee - Chairman & CEO , Sinovation Ventures

Yi Pin Ng - Founding Partner, Yunqi Partners

Jing Hong - Founding Partner, Gaocheng Capital

Dedicated networking time

14:05 - 14:50
China Day

How do LPs maintain returns given ever-increasing dry powder and competition for deals?

14:05 - 14:50
LP Only Discussion

This exclusive discussion group is only open to pre-registered development finance institutions, endowments, foundations, insurance companies, pension funds and sovereign wealth funds, subject to qualification.

To apply please contact Krystal Pierre at krystal.pierre@informa.com

Participants

Weijia Huang - Vice President, Calibrium AG

Steve Cowan - Co-Founder & Managing Director, 57 Stars

Hot sector focus - From fish to chips: is China's pursuit of semiconductor self-reliance a long-term opportunity?

14:50 - 15:20
China Day

“Made in China 2025”: Is government having too much influence in this space? How successful are the new developments considering this is a heavily invested field? Is there a role for PE?

Participants

Moderator: Andy Wang - Partner, Primary Investments, Adams Street Partners

Jason Zhao - Head of Private Equity Investment, China Post Life Insurance

Sean Peng - Senior Partner, WI Harper Group

Greg Ye - Founder & Managing Partner, Delta Capital

LP allocations: too complicated to venture in or too big to ignore?

15:25 - 15:55
China Day

How have US-China tensions influenced global investors’ perceptions and to what extent politics has an impact on their China allocation? What does Biden presidency mean for US LPs investing in China? Will other countries in Asia be benefited from this?

Participants

Kelly DePonte - Managing Director, Probitas Partners

Allen Huang - Director of Investments, Michigan State University

Christina Wu - Investment Officer, Fort Worth Employees’ Retirement Fund

Wai Leng Leong - Managing Director, Head of Asia Pacific, CDPQ

Growing amid a challenging global political environment

16:00 - 16:20
China Day

Key takeaways on China’s five-year plan and its responses to the international politics: What are China’s strategies for its continuous growth in this difficult external environment? Is the growth sustainable and where will the next growth opportunity come from? Are there any new policies in favour of global LPs’ investments in China?

Participants

Chang-Tai Hsieh - Phyllis and Irwin Winkelried Professor of Economics and PCL Faculty Scholar, The University of Chicago Booth School of Business

End of SuperReturn China

16:20 - 16:25
China Day

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15:00	**15:25** - LP allocations: too complicated to venture in or too big to ignore?		
16:00	**16:00** - Growing amid a challenging global political environment **16:20** - End of SuperReturn China		

SESSIONS

SUPERRETURN ASIA VIRTUAL - 12/05/2021

Dedicated networking time

07:30 - 08:00
Asia Day

Chair's welcome address

08:00 - 08:05
Asia Day

Beyond the Zoom boom: LP/GP relations and due diligence post-COVID

08:05 - 08:35
Asia Day

How have Zoom and other internet services changed the due diligence process beyond COVID? What does good communication look like? How are LPs selecting to new managers in this new era and how many of them committed to new managers without face to face meetings?

Participants

Seungha Ku - Managing Partner, Head of Offshore Private Equity, CreditEase Wealth Management

Kelvin Mak-Lui - Director, Private Equity, Future Fund

Maria Guo - Investment Manager, Private Markets, Sunsuper

All-star GP panel: why Asia?

08:40 - 09:20
Asia Day

How are leading GPs comparing opportunities globally and in Asia, and deploying capital without travelling? How has the global pandemic changed the opportunity set and what does the varied recovery progress in different countries mean for investments? What are the emerging themes in light of behavioural changes?

Participants

Moderator: Mingchen Xia - Managing Director, Co-Head of Asia Investments, Hamilton Lane

Simon Griffiths - Head of Private Equity Asia Pacific, EQT Partners

Ed Huang - Co-Head of Asia Acquisitions and Head of Greater China and Korea for Private Equity, Blackstone

Paul Yang - Partner and CEO of Greater China, KKR

Sourcing investments and identifying opportunities in 'the new normal'

09:25 - 09:45
Asia Day

How have international LPs' appetite to Asia and China changed and how do they access investment opportunities on a global basis? Where are LPs pivoting now? How do LPs get access to some highly sought-after deals? Will they look beyond the big GPs?

Participants

Interviewer: Kelly DePonte - Managing Director, Probitas Partners

Interviewee: Yup Kim - Investment Director and Head of Investments, CalPERS Private Equity

Dedicated networking time

09:45 - 10:30
Asia Day

Private equity portfolio construction: strategy vs geography vs sector

09:45 - 10:30
LP Only Discussion

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Participants

Qingru Li - Director, Allianz Capital Partners, GmbH Singapore Branch

Brooke Zhou - Partner, LGT Capital Partners

Venture Capital momentum in Southeast Asia

10:30 - 10:50
Asia Day

Participants

Heang Chhor - Founder and Managing Partner, Qualgro VC

Reimagining the new global economy: building the best exit strategies

10:55 - 11:25
Asia Day

With an everchanging geopolitical backdrop, public health concerns and downturn of economy, how are companies thinking about liquidity, exit routes, and different options of listing? How have GPs changed their investment strategies? How do GPs manage portfolio companies with liquidity issues?

Participants

Moderator: Henny Sender - Senior Advisor, Managing Director, BlackRock Investment Institute

Gabriel Li - CEO, Managing Partner & Investment Committee Member, Orchid Asia Group Management

Jason Yao - Head of Greater China and Managing Director, Ardian

Yuan Fang - Managing Partner, Delta Capital

In figures: distress, VC, growth and buyout investments in China

11:30 - 11:50
Asia Day

A top down view on how capital is allocated in China's private markets

Participants

Cameron Joyce - VP, Research Insights, Preqin

Dedicated networking time

11:50 - 12:20
Asia Day

Spotlights beyond China: where is the next hot spot?

12:20 - 12:45
Asia Day

A series of 20 mins fireside chats + 5 mins Q&As on each region

SEA - Is the region now firmly pinned on the maps of international LPs? In addition to digital payment and delivery services, what other sectors are heating up in VC investments? What impact will RCEP bring to the economy of these countries? Will it push back deglobalisation?

Participants

Moderator: Pamela Fung - Executive Director, Portfolio Manager for Asia Pacific, Morgan Stanley Alternative Investment Partners

Panellist: Jefrey Joe - Co-Founder & General Partner, Alpha JWC Ventures

Panellist: Conrad Tsang - Founder and Chairman, Strategic Year Holdings Limited

Spotlights beyond China: where is the next hot spot?

12:50 - 13:15
Asia Day

A series of 20 mins fireside chats + 5 mins Q&As on each region

India - The India-China conflicts, belly hit by COVID, and economic reform: how have these changed investors' mentality for investing in India and what is the future to expect? Where we will see the next Jio in India's VC space? With very few funds structurally set up for international LPs, how do LPs get access to this market?

Participants

Moderator: Gaurav Ahuja - Managing Director , ChrysCapital

Panellist: Manish Singhal - Founding Partner, pi Ventures

Panellist: Sudhir Sethi - Founder & Chairman, Chiratae Ventures

Spotlights beyond China: where is the next hot spot?

13:20 - 13:45
Asia Day

A series of 20 mins fireside chats + 5 mins Q&A on each region

Australia, Japan and the developed – what have changed in the post global pandemic era? What are the major drivers for deal flows? Has valuation become stretched given higher liquidity?

Participants

Moderator: Florian Kohler - Managing Director, Private Equity, Obviam

Takahiro Kato - Executive Officer, Head of Global Fund Investment, DBJ Asset Management

Edmond Ng - Managing Partner, Axiom Asia

Dedicated networking time

13:45 - 14:30
Asia Day

Connection session: Carbon neutrality and the circular economy: where are the opportunities?

13:45 - 14:30
Connections

LP/GP networking session run under the Chatham House Rule. Open to 26 pre-registered LP and GP attendees.

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Participants

Discussion leader: Xin Ma - Managing Director, Asia Platform, Total Carbon Neutrality Ventures

Discussion leader: Rob Kaplan - Founder & CEO, Circulate Capital

Innovating traditional business: finding pandemic proof unicorns

14:30 - 15:00
Asia Day

Where are the next billion-dollar tech companies? How do VCs access sectors in need of innovations? Is Asia an attractive place to be for technology development? How are the new regulations changing the opportunity set?

Participants

Moderator: Martin Haemmig - Adj. Professor & Partner, CeTIM/GLORAD

Melissa Guzy - Managing Partner, Arbour Ventures

Sherry Lin - Head of Global Venture Capital, Willett Advisors

Ken Yasunaga - Founder & Managing Partner, Global Hands-On VC (GHOVC)

Yinglan Tan - CEO & Founding Managing Partner, Insignia Ventures Partners

Why a post-COVID-19 world needs impact investments

15:05 - 15:35
Asia Day

How have GPs and LPs adopted ESG in their investment strategies? What are the real challenges for GPs to implement? What are the barriers and opportunities in impact investing? Under COVID, have ESG-conscious GPs delivered better returns?

Participants

Moderator: Alison Nankivell - Vice President, Fund Investments and Global Scaling, BDC Capital

Yuni Choi - Director of Investments, RS Group

Raphaël Betti - Head of Equity Risk Management, European Investment Fund

Mark McDonald - Managing Partner, DWS Private Equity

The winner takes it all: COVID impact in numbers

15:40 - 16:00
Asia Day

A full year of numbers: how are portfolio companies striving from the pandemic? looking from the return perspective: have people gained better returns in some countries than the others? Comparison of Asia, US, EU and global market in terms of returns in PE investments, by region, sector and country.

Participants

Judy Zhang - Managing Director, Cambridge Associates

Chair's closing remarks

16:00 - 16:05
Asia Day

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CONNECTIONS DAY - 13/05/2021

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Knowing where to look - turning a crisis to an opportunity

08:00 - 09:00
Connections

Identify opportunities from investment dangers: where to find opportunities and how to continue to grow? What sectors are tipped to thrive in a post-COVID world?

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email charlene.ho@informa.com. For LP registrations please email krystal.pierre@informa.com

Participants

Kai-Fu Lee - Chairman & CEO , Sinovation Ventures

Frank Su - Managing Director & Head of Private Equity Asia, CPP Investments

LP's strategies for tapping into a new market

09:00 - 10:00
LP Only Discussion

How do international LPs do due diligence and successfully source GPs when they do not have the local expertise, especially it is proven difficult for emerging markets? How do they cope with cultural and liquidity issue?

This informal session brings LPs together in a closed setting to network and discuss the latest concerns. Run under the Chatham House Rule and open to 24 pre-registered LP attendees only. For LP registrations please email krystal.pierre@informa.com

Participants

Crystal Li - Partner, GurryShark Capital

Ruchira Shukla - Regional Lead, South Asia, Disruptive Technologies, International Finance Corporation

Emerging Asian markets: risks and rewards

10:00 - 11:00
Connections

Where do GPs and LPs see opportunities in emerging markets that rely on export? How do GPs take advantage of this opportunity? How will the global alignment of political powers drive the economic growth?

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Participants

Manjia Guan - Senior Director, Head of Primaries, Asia, Capital Dynamics

Anisha Singh - Founding Partner, She Capital

Pan-Asian funds: Boon or Bane?

11:00 - 12:00
Connections

For many international investors, managing the different countries and cultures of Asia as the markets develop and change is difficult. Are Pan-Asian funds the best solution for this issue?

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Participants

Pamela Fung - Executive Director, Portfolio Manager for Asia Pacific, Morgan Stanley Alternative Investment Partners

Tanya Rolfe - Managing Partner, Her Capital

Emerging markets – local vs global

12:00 - 13:00
Connections

How do international LPs get access to the emerging markets? Are they limited to certain USD funds? Will LPs shy away from local managers?

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Participants

Florian Kohler - Managing Director, Private Equity, Obviam

Shyam Menon - Co-founder, Bharat Funds Platform

Yuan to Dollar restructuring: is the market gradually opening up to USD investors?

13:00 - 14:00
Connections

How best to use secondaries to generate liquidity and returns.

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Participants

Cari Lodge - Managing Director, Commonfund Capital

Sally Shan - Managing Director , HarbourVest Partners

Which venture strategies will succeed in the post COVID world?

14:00 - 15:00
Connections

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email charlene.ho@informa.com. For LP registrations please email krystal.pierre@informa.com

Participants

Antoine Papiernik - Managing Partner & Chairman, Sofinnova Partners

Jessica Archibald - Managing Director, Top Tier Capital Partners

End of SuperReturn China and SuperReturn Asia Virtual 2021

15:00 - 15:05
Connections

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