

Registration and morning refreshments

08:00 - 09:00
SuperReturn Energy 2022

Chair's opening remarks

09:00 - 09:10
SuperReturn Energy 2022

Participants

Daniel Strachman - Co-Founder, IMDDA Inc.

Trends and forces shaping the future of the energy sector

09:10 - 09:40
SuperReturn Energy 2022

How do GPs, LPs and operating companies address recent macro-economic, policy and geopolitical issues? Examining the drastic difference in natural gas prices in the US vs. Europe and how this creates a dual market dynamic. Are current market developments a temporarily glitch or a new normal?

Participants

Moderator: Andrew Evans - Managing Director, ARC Financial Corp.

Panellists: Scott Brown - Chairman, New Energy Capital

Alex O'Connell - CEO, Gore Street Capital

Sam Oh - Founder & CEO, Mountain Capital Management

2022 energy industry outlook

09:40 - 10:00
SuperReturn Energy 2022

An overview of the latest deal making activities across the U.S. energy sector, including funds raised, exits, strategies and top-performing sub-sectors.

Participants

Moses Rahnama - AVP, Research Insights, Preqin

The business case for renewables today

10:00 - 10:35
SuperReturn Energy 2022

What impact does the rise of green energy and renewable natural gas have on capital allocation? What has to be done to accelerate the process of achieving net-zero? Exploring new technologies and their investment risk. What type of return will wind and solar generate for LPs and will it be sufficient enough to attract sufficient capital? Looking at hydrogen and nuclear as the long-term solution.

Participants

Moderator: Shay Murphy - Partner, NGEN

Panellists: Cynthia Jaggi - Partner, Climate Adaptive Infrastructure

Amar Gujral - Managing Director & Partner, L.E.K. Consulting

Eric Danziger - Managing Director - Energy Transition, Riverbend Energy Group

Scott Lawrence - Partner, Glennmont Partners from Nuveen

Sharing LP perspectives

10:35 - 11:05
SuperReturn Energy 2022

Will we see LPs increasing their allocations to traditional energy assets, and what value does it provide? LP thoughts on inflation, and how it is driving their allocation decisions. Exploring the current view from LPs on portfolio construction and an increased interest in opportunities in emerging markets. Are LPs continuing to consider divestment as a path for energy related investments, and how do energy investments intersect with an LP's approach to ESG?

Participants

Moderator: Irene Mavroyannis - Managing Partner, Private Capital Advisory, Infrastructure | Renewables | Sustainability, Sera Global

Panellists: Ethan Levine - Managing Director, Head of Real Assets and Sustainability, Commonfund Capital, Inc.

Simon Oak - Principal, Lexington Partners

Networking coffee break

11:05 - 11:30
SuperReturn Energy 2022

Fossil fuels are not dead

11:30 - 12:15
SuperReturn Energy 2022

Oil's journey from worthless in the pandemic to \$100 a barrel. Are domestic shale gas producers able to keep up with demand? How does the market deal with competitive pressures and high depletion rates of shale gas & oil? Will the pipeline for oil & gas from Canada be revived? Exploring ways to improve fossil fuel efficiency.

Participants

Moderator: Ross Gage - Director, Investor Relations, Black Mountain

Panellists: Shaia Hosseinzadeh - Founder and Managing Partner, OnyxPoint Global Management

Michael Felman - President & CEO, MSF Capital Advisors

Kyle Kafka - Partner, EnCap Investments

Randy Newcomer, Jr. - CEO, Riverbend Energy Group

Geopolitics and international developments

12:15 - 12:30
SuperReturn Energy 2022

Participants

James Lucier - Managing Director, Capital Alpha Partners

Comparing and contrasting: traditional energy vs. renewables

12:30 - 13:00
SuperReturn Energy 2022

Exploring the trend of traditional funds launching dedicated renewable funds. Is it a temporary trend or a long-term one? Are renewable energy assets over-bid and are traditional energy assets over-sold? Exploring way to reduce carbon footprint of traditional oil & gas industry. Will geo-political tensions set back the trends in renewables, and has the Ukraine-Russia conflict killed renewable energy?

Participants

Moderator: Brittany Sakowitz - Transactional Partner, Kirkland & Ellis LLP

Panellists: Edward Geiser - Managing Partner, Juniper Capital Advisors

Michael Dalton - Managing Director, Quantum Energy Partners

David Coppé - Energy and restructuring expert, Independent advisor

Networking lunch break

13:00 - 14:00
SuperReturn Energy 2022

The role of nuclear and natural gas in a sustainable energy system

14:00 - 14:30
SuperReturn Energy 2022

EU agreement on both natural gas and nuclear to be used as transition fuels: how will this impact the energy transition space? Is there a push to phase out natural gas and will they make exceptions for transportation and heating?

Participants

Panellists: **Brian Crumley** - Managing Partner and Co-Founder, Vortus Investments

Cay Freihofer - Partner, Ridgmont Equity Partners

John Moon - Managing Director, Head, Morgan Stanley Energy Partners

U.S. Energy security policy: a global perspective

14:30 - 14:50
SuperReturn Energy 2022

Examining what the energy security strategy looks like today. How does the U.S plan to produce more of its own energy to reduce its reliance on Russian oil and gas and help tackle soaring energy prices? What are the key objectives of energy security policy?

Participants

John Vonglis - Senior Advisor and Former CFO at the U.S. Department of Energy, GAMCO Investors, Inc.

Sustainability & ESG

14:50 - 15:30
SuperReturn Energy 2022

How are investors responding to a growing emphasis on sustainability and the energy transition? In reality, what do LPs consider as "sustainable" and what do they deem to be a "good standard"? What do LPs think of fund managers' ESG policies and practices as well as those of portfolio companies? Exploring the differences in ESG rhetoric: Europe vs. U.S., private capital vs. public capital, equity vs. debt.

Participants

Moderator: **Suhrid Mantravadi** - Partner, Grey Rock Investment Partners

Panellists: **Ethan Levine** - Managing Director, Head of Real Assets and Sustainability, Commonfund Capital, Inc.

Cynthia Jaggi - Partner, Climate Adaptive Infrastructure

Bob Lang - Managing Director, FirstPoint Equity

Networking coffee break

15:30 - 16:00
SuperReturn Energy 2022

Technology: creating new investable capital opportunities

16:00 - 16:20
SuperReturn Energy 2022

Examining opportunities in disruptive and new technologies like AI and machine learning. What new technologies have a real potential to further disrupt the energy sector in the next decade? Exploring the most viable opportunities in cleantech solutions. What new risk-return models does investing in technology require and how should both operating companies and investors adapt?

Participants

Don Tappan - Partner, Braemar Energy Ventures

Electrification and implications on energy architectures, distribution and storage

16:20 - 17:00
SuperReturn Energy 2022

Examining the new drivers of electricity consumption from electric cars to data centers. What is the impact of renewables on the distribution of electricity? For electricity distribution, what are the issues surrounding efficiency, optimization, redundancy, and standardization? For the continuity of electric supply, what are the competing alternatives for energy storage?

Participants

Moderator: **Heinz Blennemann** - Principal, Blennemann Family Investments

Panellists: **Charles Bryceland** - Managing Director, Fortistar

Art Robinson - Managing Director, Longbow Capital

Izzet Bensusan - Managing Partner and Founder, Captona

Business models and strategies for the future

17:00 - 17:30
SuperReturn Energy 2022

How do LPs and GPs see the energy sector transforming in the next decade, and how do they adapt investment strategies to help accelerate the path to net-zero? What do LPs need to know about real investment returns and potential market risks? GPs sharing their perspectives on fundraising and raising first-time funds in the current environment and in consideration of LP preferences and allocation strategies.

Participants

Moderator: **Travis Hancock** - Co-Founder & Partner, Octagon Energy Partners

Panellists: **Edward Geiser** - Managing Partner, Juniper Capital Advisors

Shaia Hosseinzadeh - Founder and Managing Partner, OnyxPoint Global Management

George McCormick - Co-Founder & Managing Partner, Outfitter Energy Capital

Chair's closing remarks & end of SuperReturn Energy

17:30 - 17:35
SuperReturn Energy 2022

Participants

Daniel Strachman - Co-Founder, IMDDA Inc.

SCHEDULE

SUPERRETURN ENERGY 2022 - 12/09/2022

SuperReturn Energy

September 12, 2022
The Westin
New York Times Square

| TIME | SUPERRETURN ENERGY 2022 |
|--------------|--|
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| 12:00 | 12:15 - Geopolitics and international developments 12:30 - Comparing and contrasting: traditional energy vs. renewables |
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