

SESSIONS

DAY ONE - 01/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Chair's opening remarks

09:30 - 09:40

CEO Insights

Participants

Chair: Chris Hunter - CEO, Cambridge Associates (UK) Limited

Navigating the private equity industry in a complex of profound disruptions

09:40 - 10:10

CEO Insights

Examining the seismic economic and societal changes triggered by COVID-19 – what are the biggest challenges and opportunities facing private equity today? How has the pandemic impacted on current and future private equity investment strategies?

Participants

Cian Cotter - Managing Director, Insight Partners

Raising the game: To what extent has private equity moved from asset manager to manager of assets?

10:15 - 10:45

CEO Insights

What are LPs looking for and what will be important 10 years from now? Acting in a responsible way as a collective and future-testing investments to ensure they are ESG compatible. How are PE firms seeking new approaches to generate positive impact and sustainable returns and implement ESG throughout the life cycle and beyond, and how can they communicate, connect and contribute better to wider society?

Participants

Moderator: David Jeffrey - Partner, Head of Europe, StepStone Group

Panellists: Kurt Björklund - Managing Partner, Permira

Simon Marc - Senior Managing Director, Global Head of Private Equity, PSP Investments

Andrea Bonomi - Founder and Chairman, Investindustrial

Private equity as a change agent in a world changed forever: Examining the fundamental themes accelerated by the pandemic

10:50 - 11:20

CEO Insights

To what extent are boardroom discussions today different from last year? Are ESG considerations more important to investment decisions today? How have technology priorities escalated given the growth in online purchasing? How attractive is healthcare investing? Is the private equity industry moving fast enough to be at the forefront of disruption and to help entrepreneurs and family companies deal with transition? Is private equity stepping up to be helpful enough?

Participants

Moderator: Helen Steers - Partner, Pantheon

Panellists: Christian Sinding - CEO & Managing Partner, EQT

David Novak - Co-President, Clayton Dubilier & Rice

Rob Lucas - Managing Partner, CVC Capital Partners

Johannes Huth - Partner & Head of KKR EMEA, KKR

Dedicated networking time

11:20 - 11:50

CEO Insights

LP-only discussion group Update on Co-investments and direct investments

11:20 - 11:50

CEO Insights: LP-only

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 Chloe Elliott at chloe.elliott@informa.com

Participants

Discussion leaders: Jean-François Le Ruyet - Partner, Quilvest Capital Partners

Mercedes Fernandez Elias - Partner AIP Private Markets, Morgan Stanley Investment Management

Is this Europe's moment?

11:50 - 12:20

CEO Insights

How confident is the private equity industry that Europe has leaned from the GFC and grasped the transformative trends of the future including ESG, climate change and digitisation? Is the way forward to invest in secular trends? Will Europe's monetary policy help or harm?

Participants

Moderator: Neil Harper - Chairman, Turkven Private Equity

Panellists: Richard Hope - Head of EMEA, Fund Investment Team Europe, Hamilton Lane

Charlotte Ruhe - Managing Director, Central & South Eastern Europe, EBRD

Dörte Höppner - Chief Operating Officer, Riverside Europe Partners

Gregory Dewerpe - Founder, A/O PropTech

Buy the future and sell the past! How can private equity firms future-proof their portfolios, look to the future and go where the growth is?

12:25 - 12:55

CEO Insights

How are private equity firms dealing with their structurally challenged legacy investments and transitioning to tomorrow's world? Is the industry innovating fast enough and will only the paranoid survive? How to overcome the risks of inflation, regulation, asset bubbles and low interest rates.

Participants

Moderator: Andrew Brown - Head of Private Equity Research, Willis Towers Watson

Panellists: Eric Bismuth - CEO, Montefiore

Miriam Schmitter - Managing Director, Commonfund Capital

Maria Cantillon - Head of Sales, EMEA, Citi

J. Christopher Flowers - Managing Director & CEO, J.C. Flowers & Co

Dedicated networking time

12:55 - 13:25

CEO Insights

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How can the European mid-market overcome the growing problem of competition as numbers of PE firms and dry power continue to grow?

13:25 - 13:55

CEO Insights

Examining the success of expanding strategies by specialising in various ways to seek sustainable competitive advantage. To what extent can sector-focused funds, strategy focused funds, funds with a key competency in sourcing, operational value-add or innovative fee structures offer LPs an edge within their programmes?

Participants

Moderator: Christopher Bär - Managing Director, MPEP Luxembourg Management S.à r.l.

Panellists: Christopher Masek - CEO, IK Investment Partners

Frode Strand-Nielsen - Managing Partner, FSN Capital Partners

Lindsey McMurray - Managing Partner, Pollen Street Capital

Oliver Haarmann - Founding Partner, Searchlight Capital Partners

Anatomy of a Retail Investment

14:00 - 14:30

CEO Insights

Participants

Raymond Svider - Chairman and Partner, BC Partners

Interviewed by: Miriam Gottfried - Reporter, The Wall Street Journal

Fundraising in the COVID era: A retrospective of how GPs raised virtually in 2020

14:35 - 15:05

CEO Insights

What were the pros and cons of virtual fundraising and lessons learned in 2020? How has it impacted younger funds vs established players? Re-ups vs new funds? What will be the long-term impact on changes to way funds are raised?

Participants

Moderator: Matthew Hardcastle - Client Development Director, DealCloud, an Intapp Company

Panellists: Richard Howell - Managing Partner, PAI Partners

Katja Salovaara - Senior Investment Officer - Private Equity, New York City Retirement Systems

J. Christopher Kojima - Partner, Goldman Sachs

Johanna Barr - Managing Director and Global Co-Head of Limited Partner Services, Advent International

Dedicated networking time

15:05 - 15:35

CEO Insights

Connections: GP stake sales from all angles

15:05 - 15:35

CEO Insights: Connections

Analysing the current market environment for GP stakes

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email chloe.elliott@informa.com.

Participants

Discussion leader: Dadong Yan - Portfolio Manager, Alternative Investments, MassMutual

Private equity under pressure: Successfully deploying capital amid economic and political uncertainty, increased competition and rising stakeholder expectations

15:35 - 16:05

CEO Insights

How can PE firms move faster to drive strategic growth, create greater value and drive meaningful impact across funds?

Participants

Moderator: Merrick McKay - Head of Europe – Private Equity, Aberdeen Standard Investments

Panellists: Gilles Collombin - Partner & Head of Investor Relations, Charterhouse Capital Partners

Rainer Ender - Head of Private Equity, Member of the Investment Committee, Schroder Adveq

Dana Haimoff - Managing Director, Portfolio Manager, J.P Morgan Asset Management

The critical impact of technology: sourcing and completing deals in an increasingly competitive environment

16:10 - 16:40

CEO Insights

Participants

Katie May - Director, InCloudCounsel

Closing Keynote Address: The impact of the Biden administration on global investment

16:45 - 17:15

CEO Insights

The Biden administration has economic and financial priorities and goals far different than those of the Trump administration.

How will these differences positively or adversely affect private investment activity in the United States, Europe, and the rest of the world?

Will the global community follow the lead of the U.S. in many of these areas, or will there be continuing economic and investment tensions between the U.S., Europe, and Asia?

These questions will be addressed by David M. Rubenstein, Co-Founder and Co-Chairman of The Carlyle Group and Chairman of the Council on Foreign Relations.

Participants

David Rubenstein - Co-Founder & Co-Chairman, The Carlyle Group

Chair's closing remarks & the end of the CEO Insights Day

17:15 - 17:20

SCHEDULE

DAY ONE - 01/03/2021

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TIME	CEO INSIGHTS	CEO INSIGHTS: CONNECTIONS	CEO INSIGHTS: LP-ONLY
09:00	<p>09:30 - Chair's opening remarks</p> <p>09:40 - Navigating the private equity industry in a complex of profound disruptions</p>		
10:00	<p>10:15 - Raising the game: To what extent has private equity moved from asset manager to manager of assets?</p> <p>10:50 - Private equity as a change agent in a world changed forever: Examining the fundamental themes accelerated by the pandemic</p>		
11:00	<p>11:20 - Dedicated networking time</p> <p>11:50 - Is this Europe's moment?</p>		11:20 - LP-only discussion group Update on Co-investments and direct investments
12:00	<p>12:25 - Buy the future and sell the past! How can private equity firms future-proof their portfolios, look to the future and go where the growth is?</p> <p>12:55 - Dedicated networking time</p>		
13:00	<p>13:25 - How can the European mid-market overcome the growing problem of competition as numbers of PE firms and dry power continue to grow?</p>		
14:00	<p>14:00 - Anatomy of a Retail Investment</p> <p>14:35 - Fundraising in the COVID era: A retrospective of how GPs raised virtually in 2020</p>		
15:00	<p>15:05 - Dedicated networking time</p> <p>15:35 - Private equity under pressure: Successfully deploying capital amid economic and political uncertainty, increased competition and rising stakeholder expectations</p>	15:05 - Connections: GP stake sales from all angles	
16:00	<p>16:10 - The critical impact of technology: sourcing and completing deals in an increasingly competitive environment</p> <p>16:45 - Closing Keynote Address: The impact of the Biden administration on global investment</p>		
17:00	17:15 - Chair's closing remarks & the end of the CEO Insights Day	17:15 - Chair's closing remarks & the end of the CEO Insights Day	17:15 - Chair's closing remarks & the end of the CEO Insights Day

SESSIONS

DAY TWO - 02/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

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Chair's opening remarks

08:50 - 09:00

Private Credit: Day One

Participants

Morning chair:: Anthony Fobel - CEO, Arcmont Asset Management

One year into the crisis: private credit performance review

09:00 - 09:20

Private Credit: Day One

Making sense of the last 12 months – what does fundraising, deployment and exit data show about how well the asset class has passed its first stress test? How is private credit coming out of the crisis and what shape and form will the recovery take?

Participants

Leo Fletcher-Smith - Strategy Head, European Private Credit, Aksia Europe

Charting the path to the new normal: assessing the evolution of the private credit landscape

09:25 - 10:10

Private Credit: Day One

Assessing the impact of the pandemic on private credit – when and how will fundamentals start feeding through? How are expectations changing across allocation and deployment? How have deals been priced under COVID-19 circumstances, and what structures are proving most successful? What are the short- and long-term implications of the pandemic and how are they influencing the outlook for the asset class as we enter the next economic cycle?

Participants

Moderator: Marcel Schindler - Partner, CEO StepStone Private Debt, StepStone Group

Panellists: Robin Doumar - Managing Partner, Park Square Capital

Blair Jacobson - Partner, Co-Head of European Credit, Ares Management LLC

Greg Racz - President, MGG Investment Group

Peter Glaser - Head of European Direct Lending, Alcentra Limited

Chair's opening remarks

09:30 - 09:35

Healthcare and Life Sciences: Day One

Participants

Felice Verduyn-van Weegen - Investment Manager, Life Sciences Partners

The urgent need to grasp the huge opportunities of Life Sciences sector provoked by the COVID crisis

09:40 - 10:00

Healthcare and Life Sciences: Day One

The compelling consequences of the COVID crisis: the pressing need & duty to invest in continuity & to think ecosystem

Participants

Rafaèle Tordjman - Founder and CEO, Jeito Capital

The return to "the new normal"

10:05 - 10:40

Healthcare and Life Sciences: Day One

How has investment landscape changed and evolved following the global pandemic? What are the key takeaways for investment professionals? Exploring the main barriers when investing in life science companies. Sharing best practices and strategies for making the right investment decisions in the current climate. What innovations have fund managers made to their investment strategies to withstand competition from corporate buyers?

Participants

Moderator: Kelly DePonte - Managing Director, Probitas Partners

Rasmus Molander - Partner, Adelis Equity Partners

Pieter van der Meer - Managing Partner, Gilde Healthcare

Alan MacKay - Managing Partner and Co-founder, GHO Capital

Puncham Mukim - Managing Director, Everstone Capital

Where there's risk, there's opportunity: how are GPs boosting portfolio performance and planning for the future?

10:15 - 10:50

Private Credit: Day One

How have GPs been supporting portfolio companies through the pandemic? How have they enhanced their management tool kits to boost portfolio performance, manage covenant breaches and meet liquidity needs? With government support schemes starting to be waned out in 2021, how are GPs adjusting their portfolio management strategies, and which approach works best – debt to equity swaps, exits, selling into the secondaries? Where are managers finding the most attractive risk adjusted returns and how is that impacting their capital raising and deployment plans into 2021?

Participants

Moderator: Frank Fama - Managing Director, Cambridge Associates

Panellists: Karen Simeone - Managing Director, HarbourVest Partners

Oliver Duff - Senior Managing Director and Global Head of Credit Investments, PSP Investments

Christopher Mikosh - Portfolio Manager, Co-Founder, Tor Investment Management

Fundraising snapshot

10:45 - 11:05

Healthcare and Life Sciences: Day One

How much money did fund managers managed to raise under the pressure of pandemic? What sectors have experienced the most capital flow? Explaining a drop in capital deployment in 2020 and exploring the exit environment. Looking across all European markets and asset classes, including private equity, venture capital, and private credit

Participants

David Lowery - Head of Research Insights, Preqin

Dedicated networking time

10:50 - 11:30

Private Credit: Day One

Dedicated networking time

11:05 - 11:35

Healthcare and Life Sciences: Day One

Answering the difficult questions in private debt

11:30 - 11:50

Private Credit: Day One

Participants

Anthony Fobel - CEO, Arcmont Asset Management

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Pharma: Part 1

11:35 - 12:10

Healthcare and Life Sciences: Day One

Bridging the gap between venture capital funding and an IPO. How do you prevent expensive, late-stage development from stalling? Eliminating discrepancy between the relatively short-term investment period of PE and the notoriously long drug development timelines within pharma: what are the best tactics? The rise of R&D outsourcing in pharmaceutical industry. Spotlight on the manufacturing of vaccines and antivirals, and how some nations have fuelled R&D and production through government investments. Personalised medicine and how genomics are transforming cancer care.

Participants

Moderator: Dirk Kersten - General Partner, Forbion

Tim Haines - Chairman & Managing Partner, Abingworth LLP

Felice Verduyn-van Weegen - Investment Manager, Life Sciences Partners

Mårten Steen - Partner, HealthCap

LP allocations to private credit: have investors found a new safe haven?

11:55 - 12:40

Private Credit: Day One

How have investors managed to continue ramping up their portfolios in the context of the pandemic? What is important for LPs – how has their allocation changed for private credit vs private equity vs public markets? Has private credit performance met expectations and what does that spell out for future commitments to the asset class? Strategies and structures - where are the sweet spots for LPs in a post-pandemic world?

Participants

Moderator: James Newsome - Managing Partner, Arbour Partners

Panellists: Sebastian Schroff - Global Head of Private Debt, Allianz Investment Management SE

Brandon Laughren - Chief Investment Officer, The Laughren Group

Filippo Casagrande - Head of Insurance Portfolios Investment Strategy - Group Investments, Assets & Wealth Management, Assicurazioni Generali

Pharma: Part 2

12:15 - 13:00

Healthcare and Life Sciences: Day One

Therapeutics and Diagnostic services in the spotlight. Evaluating the amount of dry powder available for deploying. Have buyers' and sellers' pricing expectations around valuations beginning to align? How risky is it to invest in Biotech? Exploring cross-over investing by the biotech hedge and mutual funds. Dealing with the mismatch between the investment cycle and the development cycle: does VC have an advantage over PE? Evaluating the opportunities for investing in contract research and manufacturing. The cutting edge of cell and gene therapies

Participants

Moderator: Ben Challgren - Vice President, Top Tier Capital Partners

Francesco De Rubertis - Co-founder & Partner, Medicxi

Arthur Franken - General Partner, Gilde Healthcare

Joe Anderson - Partner, Sofinnova Partners

Comparing and contrasting performance across fund strategies

12:45 - 13:25

Private Credit: Day One

3 case studies – 30 mins

Q&A – 10 mins

A series of three case studies providing a unique insight into the life cycle of a deal, covering origination, replication of discussion held during investment committee meeting all the way to monitoring of the transaction. The case studies will cover various strategies e.g. unitranche vs special situations debt and sponsored vs sponsorless ownership.

Participants

Fabian Chrobog - Founder and CIO, North Wall Capital

Henrik Bjerklin - Managing Director, Proventus Capital Partners

Bertram Schütz - Partner - Head of DACH region, CAPZA

Dedicated networking time

13:00 - 13:30

Healthcare and Life Sciences: Day One

Dedicated networking time

13:25 - 13:45

Private Credit: Day One

LP-only discussion group: Creating a diversified private credit portfolio as the asset class matures

13:25 - 14:10

Private Credit: LP-only

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To apply please contact Savannah Charles at savannah.charles@informa.com

Participants

Discussion leader:: Francesco Battazzi - Head of Diversified Debt Fund Investments, European Investment Fund – EIF

Getting on top of regulations

13:30 - 13:50

Healthcare and Life Sciences: Day One

The Biden Administration's Healthcare agenda and appointments and their impact on the Pharmaceutical and Device industries

Participants

Jack Kalavritinos - Senior Director, APCO Worldwide

Chair's opening remarks

13:45 - 13:50

Private Credit: Day One

Participants

Afternoon chair:: Fred Nada - Partner, Arcmont Asset Management

SESSIONS

DAY TWO - 02/03/2021

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Medical Devices, equipment and products

13:55 - 14:35

Healthcare and Life Sciences: Day One

Understanding the competitive landscape and identifying unmet clinical needs. Discovering emerging device technologies and key trends. Best advice on achieving high margins, good growth metrics and capitalising on the opportunities in this sector. Understanding the dynamics of the industry, the positioning and value creation potential of specific assets, and the implications of recent events. Best practices in contract manufacturing of medical devices

Participants

Moderator: Antoine Papiernik - Managing Partner & Chairman, Sofinnova Partners

Rainer Strohmenger - Managing Partner, Wellington Partners

Hooman Hakami - Co-Founder, Forte Health Advisors

Alessandro Petracchia - Partner, Progressio SGR S.p.A.

Alexander Schmitz - Partner, Endeavour Vision

Redefining relative value

13:55 - 14:35

Private Credit: Day One

How has the definition of risk adjusted returns changed over the past 12 months? Performing vs distressed, mid-market vs large cap vs small cap, Southern vs Northern Europe vs US vs UK - what idiosyncratic risks and return components have emerged across different strategies, assets and regions? Where can investors find value in a dislocated market?

Performing vs distressed

Does size matter

Regional comparison

Participants

Theodore Koenig - President & CEO, Monroe Capital

Andrea Pescatori - Managing Partner, Ver Capital SGR

Rohit Dhote - Managing Director, Bridgepoint Credit

In conversation with: Gabriella Kindert - Non Executive Director, Expert in Alternative Lending, Mizuho Europe

Healthcare services: Part 1

14:40 - 15:20

Healthcare and Life Sciences: Day One

What does the future of private equity investment in healthcare look like? What structural changes are required post- COVID-19 to create opportunity for PE to help their businesses emerge strongly? How have the investment strategies changed in the last year and what can, and should healthcare systems do to prepare for future pandemics?

Examining the current market conditions, and how can PE play a part? Agreeing on sustainable valuations for the services and businesses that experienced a significant drop during lockdowns

Participants

Moderator: Laurent Ganem - Founder and CEO, G Square Healthcare Private Equity LLP

Kevin Ryan - Partner, Ares Management

Marc Benatar - Partner, Apax Partners

Jasper van Gorp - Managing Partner, Gilde Healthcare

Henry Elphick - Deputy Chair, European Healthcare Private Equity Association

Direct lending: are the rules changing?

14:40 - 15:10

Private Credit: Day One

Origination and volume – how are senior direct lenders approaching the market? Have they channelled their energies into specific sectors? How are they responding to the banks' retrenchment and how do they envision their role in the market going forward? How have direct lenders changed their investment practices in response to the new insights gained and risks faced? Have they changed their view on certain credits and are there any new requirements they are looking for when conducting due diligence?

Participants

Moderator: Abhik Das - Managing Director, Head of Private Debt, Golding Capital Partners

Panellists: Tara Moore - Managing Director, Head of European Originations, Golub Capital

Luis Mayans - Partner and Deputy Head, Private Debt, CDPQ

Karen Halliday - Partner, Varagon Capital Partners

Jocelyn Lewis - Executive Director, Private Debt Strategy, Financial Services, IHS Markit

Structured Credit: Post-Covid Opportunities

15:15 - 16:00

Private Credit: Day One

What's the play - bank deleveraging 2.0: asset disposals and capital optimisation, private capital for mezzanine finance, securitisation has a key role: SMEs, NPLs, loan warehousing. How is it different this time - demand side / supply side, regulation, EU funds for SME recovery? How is it the same – scale, multiple jurisdictions, credit risk quality. Why is structured credit compelling and additive to an LP's portfolio - better alignment of interests, structural enhancement, returns above corporate credit, direct lending, Improves profile with better metrics.

Participants

Moderator: Joe Abrams - European Head of Private Debt, Mercer

Panellists: Dean Atkins - Managing Director, Investment Management, Europe, 400 Capital

Pablo Sanchez Gonzalez - Head of Securitisations Southern Europe, European Investment Fund

Gilles Marchesin - Principal, Chief Executive Officer, Chorus Capital Management Limited

Dedicated networking time

15:20 - 15:50

Healthcare and Life Sciences: Day One

LP only discussion group

15:20 - 15:50

Healthcare and Life Sciences: LP-only

What makes Healthcare and Life Sciences so attractive to institutional investors? LPs on asset class allocation, portfolio construction and manager selection, governance and risk management, organizational design and decision making

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 Savannah Charles at savannah.charles@informa.com

Participants

Discussion leaders: Tobias Winter - Co-Head, UNIQA Health Invest

Stefan Fällgren - Senior Investment Manager - Private Equity, Skandia Mutual Life Insurance Company

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Healthcare services: Part 2

15:50 - 16:30

Healthcare and Life Sciences: Day One

How do we see the medical diagnostics industry evolving over the next 10 years? Evaluating the opportunities for social care investments. Analysing the role of VC and growth investing in Healthcare space. Debt vs. Equity financing: has there been a shift, and what is today's preference? What is the current exit environment? The emergence of new buyer groups and its effect on deal sourcing

Participants

Moderator: Sam Gray - Managing Partner, Apposite Capital

Christian Dubé - Partner, August Equity

Jeffrey Jay - Senior Managing Director, Great Point Partners

Liz Jones - Partner, Livingbridge

Dedicated networking time

16:00 - 16:30

Private Credit: Day One

Chair's closing remarks & the end of Day One

16:30 - 16:35

Healthcare and Life Sciences: Day One

Participants

Charles Boorady - Founding Managing Director, Health Catalyst Capital Management LLC

Distressed, stressed and special situations: timing the next window of opportunity

16:30 - 17:00

Private Credit: Day One

How did the distressed cycle manifest itself in the context of the government support programmes? Did activity and performance results match expectations? Is the roll out of government schemes going to bring about a new wave of distressed opportunities, and how can GPs and LPs position themselves to take advantage of the next window?

Participants

Moderator: Greg Myers - Global Segment Head – Debt & Capital Markets, Alter Domus

Panellists: Reji Vettasseri - Lead Portfolio Manager - Private Markets, DECALIA Group

Ian Jackson - Managing Director, Fund Head – Carlyle Strategic Partners, The Carlyle Group

Jason New - Co-CEO and Head of Opportunistic Credit, Onex Credit

Steven Heanly - Senior Portfolio Manager, Head of Research Europe, Cross Ocean Partners

Defining the new opportunity set: fundraising and deployment into 2021

17:05 - 17:35

Private Credit: Day One

Participants

David Lowery - Head of Research Insights, Preqin

Chair's closing remarks and end of SuperReturn Private Credit Europe Day 1

17:40 - 17:45

Private Credit: Day One

SCHEDULE

DAY TWO - 02/03/2021

SuperReturn Europe Virtual

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Virtual Event

GMT (Greenwich Mean Time)

TIME	HEALTHCARE AND LIFE SCIENCES: DAY ONE	HEALTHCARE AND LIFE SCIENCES: LP-ONLY	PRIVATE CREDIT: DAY ONE	PRIVATE CREDIT: LP-ONLY
08:00			08:50 - Chair's opening remarks	
09:00	09:30 - Chair's opening remarks 09:40 - The urgent need to grasp the huge opportunities of Life Sciences sector provoked by the COVID crisis		09:00 - One year into the crisis: private credit performance review 09:25 - Charting the path to the new normal: assessing the evolution of the private credit landscape	
10:00	10:05 - The return to "the new normal" 10:45 - Fundraising snapshot		10:15 - Where there's risk, there's opportunity: how are GPs boosting portfolio performance and planning for the future? 10:50 - Dedicated networking time	
11:00	11:05 - Dedicated networking time 11:35 - Pharma: Part 1		11:30 - Answering the difficult questions in private debt 11:55 - LP allocations to private credit: have investors found a new safe haven?	
12:00	12:15 - Pharma: Part 2		12:45 - Comparing and contrasting performance across fund strategies	
13:00	13:00 - Dedicated networking time 13:30 - Getting on top of regulations 13:55 - Medical Devices, equipment and products		13:25 - Dedicated networking time 13:45 - Chair's opening remarks 13:55 - Redefining relative value	13:25 - LP-only discussion group: Creating a diversified private credit portfolio as the asset class matures
14:00	14:40 - Healthcare services: Part 1		14:40 - Direct lending: are the rules changing?	
15:00	15:20 - Dedicated networking time 15:50 - Healthcare services: Part 2	15:20 - LP only discussion group	15:15 - Structured Credit: Post-Covid Opportunities	

SCHEDULE

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TIME	HEALTHCARE AND LIFE SCIENCES: DAY ONE	HEALTHCARE AND LIFE SCIENCES: LP-ONLY	PRIVATE CREDIT: DAY ONE	PRIVATE CREDIT: LP-ONLY
16:00	16:30 - Chair's closing remarks & the end of Day One		16:00 - Dedicated networking time 16:30 - Distressed, stressed and special situations: timing the next window of opportunity	
17:00			17:05 - Defining the new opportunity set: fundraising and deployment into 2021 17:40 - Chair's closing remarks and end of SuperReturn Private Credit Europe Day 1	

SESSIONS

DAY THREE - 03/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Chair's opening remarks

09:30 - 09:35

Healthcare and Life Sciences: Day Two

Participants

Karin Kleinhans - Investment Manager, Life Sciences Partners

Chair's opening remarks

09:30 - 09:35

Private Credit: Day Two

Present and future

09:40 - 10:10

Healthcare and Life Sciences: Day Two

The summary of key factors healthcare investment leaders should consider meeting patient needs and transform the healthcare experience. What are some of the most important trends shaping the industry? What is the next big thing? Exploring sub-sectors that look most promising from the investment standpoint. Where are the next big opportunities for investors?

Participants

Moderator: Hekla Arnardottir - General Partner, Crowberry Capital

Christian Weiß - Managing Partner, heal.capital Management GmbH

Anja Bickelmaier - Co-Head of Healthcare, Triton Partners

Sam Gray - Managing Partner, Apposite Capital

The proliferation of niche and specialty finance: taking advantage of the market dislocation

09:40 - 10:10

Private Credit: Day Two

What kind of returns are being realised across niche and specialty strategies? What are LPs targeting in terms of returns and diversification when looking at these strategies? What are the risks associated with niche and specialty finance and does the attached risk premium make sense to investors? How big is the opportunity across niche and specialty finance? What are the strategies contending to become a big as direct lending – litigation, asset-backed, microfinance to SMEs?

Participants

Moderator: Matthias Unser - Managing Director, YIELCO Investments AG

Panellists: Lindsey McMurray - Managing Partner, Pollen Street Capital

You-Ha Hyun - Investment Director, Perpetual Investors

Eduardo D'Alessandro - Co-head of Investment Teams, Europe & Partner, Castlake, L.P.

Drug and medical device discovery and commercialization

10:15 - 10:45

Healthcare and Life Sciences: Day Two

Understanding the legal framework around the development, testing and sale of new medicines and medical devices. Exploring the current model for financing drug development: from concept through approval. What are the key challenges to be aware of and what is the pay-off? Early-stage vs. late-stage development: when to invest? Company creation strategies for early-stage drug discovery. Opportunities to improve the financial landscape

Participants

Moderator: Manoj Sahasrabudhe - Managing Partner, Medi-Tech Insights

Rainer Strohmenger - Managing Partner, Wellington Partners

Dirk Kersten - General Partner, Forbion

Aman Kumar - Co-Portfolio Manager, Oaktree Capital

Asset-backed lending in private markets: an underestimated strategy?

10:15 - 10:45

Private Credit: Day Two

What are the drivers for the increasing demand for asset-backed lending – performance, protection, price? When and why do LPs choose asset-backed finance to other strategies? Is Europe's asset-backed lending market lagging behind the US and what lessons can investors and managers learn from across the pond? Asset-light – growing in popularity, but are the margins becoming too tight for LPs?

Participants

Peter Plaut - Executive Director, Wimmer Financial LLP

In conversation with: Patrick Stutz - CIO, Bayshore Capital

Benjamin Fanger - Managing Partner, ShoreVest Partners

Dedicated networking time

10:45 - 11:15

Private Credit: Day Two

Regenerative medicine

10:50 - 11:15

Healthcare and Life Sciences: Day Two

Examining potential funding models to support the development of regenerative medicine therapies. Special focus on filling the funding gap. What are the key market drivers and how can PE and VC help accelerate pathways for advanced therapy medicinal products (ATMPs)?

Participants

Pierre Socha - Partner, Amadeus Capital Partners

In conversation with: Jason Foster - CEO, Ori Biotech

Dedicated networking time

11:15 - 11:45

Healthcare and Life Sciences: Day Two

ESG and impact investment: time to walk the walk?

11:15 - 12:00

Private Credit: Day Two

How are GPs and LPs preparing for the wave of ESG regulations coming into force across Europe? How are ESG policies being implemented as part of the investment decision process? What are LPs demanding from GPs when it comes to ESG? How can fund managers work with portfolio companies to improve ESG metrics? How can social impact be measured in the context of private credit and what are the KPIs? How to incorporate ESG and impact to boost performance and help achieve the coveted double bottom line?

Participants

Moderator: Lorelei Graye - Founder and President, Adopting Data Standards Initiative

Panellists: Maarten Biermans - Head Sustainable Markets, Rabobank

Phil Davis - Director of ESG, Helios Investment Partners

Rashad Kaldany - Chief Investment Officer, BlueOrange Sustainable Capital

Aurélien Hariton-Fardad - Director, MetLife Investments

SESSIONS

DAY THREE - 03/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Digital therapeutics and digital drugs

11:45 - 12:20

Healthcare and Life Sciences: Day Two

Analysing the potential and controversy surrounding digital therapy. What lies ahead for this fast-moving sector? Can we expect digital blockbusters in the new space of digital therapeutics and digital drugs? Reimbursement, value, and business models: who will end up paying?

Participants

Moderator: Regina Hodits - Managing Partner, Wellington Partners

Baudouin Hue - Partner, Karista

Markus Müschenich - Managing Partner, Eternity.Health

Janke Dittmer - General Partner, Gilde Healthcare

Governments vs banks vs private credit managers: the evolving dynamics of competition and market share

12:05 - 12:45

Private Credit: Day Two

How are fund managers dealing with government competition in the private credit space? How has regulatory capital relief impacted deal flow and how will government sponsored deals be refinanced in the future? Is the banks' role evolving again - how has COVID-19 impacted their lending approach, underwriting, credit analysis, selection process? Are they further retrenching, and what opportunities does this bring for institutional pools of capital? Has COVID-19 accelerated the structural change of the past few years and helped private credit managers gain market share?

Participants

The governmental investor view:: Alexander Thees - Co-CEO, Senior Managing Director, KfW Capital

The bank view:: Dirk Holz - Director, Head of Private Capital Services Product, RBC Investor & Treasury Services

The private credit view:: Zachary Lewy - CEO and CIO of Fund Management, Managing Principal, AGGCM, Arrow Global

In conversation with:: Gabriella Kindert - Non Executive Director, Expert in Alternative Lending, Mizuho Europe

The good, the bad and the ugly of fundraising in COVID times

12:25 - 13:00

Healthcare and Life Sciences: Day Two

Frustrations, failures, but ultimately one of the most successful operations in the history of the firm

Participants

Bommy Lee - Head of Communications, Sofinnova Partners

Cedric Moreau - Partner, Sofinnova Partners

Antoine Papiernik - Managing Partner & Chairman, Sofinnova Partners

Dedicated networking time

12:45 - 13:15

Private Credit: Day Two

Connections: Considerations for investing in a low interest rates environment

12:45 - 13:30

Private Credit: Connections

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email nedina.stevens@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leader:: Brett Hickey - Founder & CEO, Star Mountain Capital

Dedicated networking time

13:00 - 13:30

Healthcare and Life Sciences: Day Two

Secondaries: a new pool of opportunities as we head into another year of dislocations

13:15 - 13:55

Private Credit: Day Two

Assessing deal volumes and drivers in the secondaries – liquidity needs, portfolio adjustments, GP-led restructurings? What is the evidence of the growth in the market? How much demand are GP-led private credit secondaries going to generate? What are the opportunities GPs and LPs can access in the secondaries space?

Participants

Moderator: Damon Krytzer - Managing Director, Probitas Partners

Panellists: Jeff Hammer - Senior Managing Director and Global Co-Head of Secondaries, Manulife Investment Management

Toni Vainio - Partner, Pantheon Ventures

Olga Kosters - Head of Private Debt Secondaries, Tikehau Capital

Technological innovation

13:30 - 14:05

Healthcare and Life Sciences: Day Two

Exploring how technology is addressing rising costs, changing demographics, evolving regulations, and industry consolidation with digital solutions that increase efficiency, mitigate risk, and enhance customer satisfaction. The latest in nanomedicine, IoT, AI and virtual healthcare. What are some of the most promising technological innovations to invest in?

Participants

Moderator: Michael Wiczorek - Partner, Elm Capital

François Robinet - Managing Partner, AXA Venture Partners (AVP)

Michael Cole - Managing Partner, Global Neurohealth Ventures

Alex Slack - Chief Investment Officer, Lauxera Capital Partners

The new risk metrics: how are GPs and LPs protecting their positions?

14:00 - 14:30

Private Credit: Day Two

How has COVID-19 redefined risk parameters in private credit? What risks are on GPs' and LPs' minds a year into the pandemic? What specific actions are they taking, and what are some of the assumptions that underpin these decisions - adjusting underwriting parameters, becoming stricter on covenants? How have LPs changed their allocation strategies with regards to types of funds and strategies?

Participants

Moderator: Jens Ernberg - Managing Director and Co-Head Private Credit, Capital Dynamics

Panelists: Brian McCarthy - Head of Yield Enhancement, Fixed Income, Ampega Asset Management

Tuomo Hietaniemi - Portfolio Manager, Elo Mutual Pension Insurance Company

Anthony Robertson - CIO, Strategic Value Credit, Cheyne Capital

Healthcare IT

14:10 - 14:45

Healthcare and Life Sciences: Day Two

What is attracting PE to this lucrative sector? Examining opportunities and latest advances in Healthcare IT. Addressing security and privacy concerns surrounding cloud based medical records and dangers of hacking IT-powered implantable devices. Health data, privacy and monetization. Addressing the issues associated with using health data and health outcomes to drive reimbursement and price insurance

Participants

Moderator: Charles Boorady - Founding Managing Director, Health Catalyst Capital Management LLC

Shane Chesson - Partner, Openspace Ventures

Alexander Frolov - General Partner and CEO, Target Global

Jean-Marc Patouillaud - Co-Managing Partner, Partech Partners

Dedicated networking time

14:30 - 15:00

Private Credit: Day Two

Dedicated networking time

14:45 - 15:15

Healthcare and Life Sciences: Day Two

Strategies for the next interest rate and economic cycles

15:00 - 15:30

Private Credit: Day Two

Professor Kroszner will provide insights into extraordinary central bank actions and the ongoing policy responses to counter the impact of COVID-19. He will take your questions and discuss what's next for global financial markets and interest rates, as policy makers gear up to face the next wave of economic and health challenges.

Participants

Randall S. Kroszner - Deputy Dean and Professor, Former Governor of the US Federal Reserve System, University of Chicago Booth School of Business

Emerging trends and final thoughts

15:15 - 15:45

Healthcare and Life Sciences: Day Two

Exploring some of the key emerging trends in buy and build models of investment. Opportunities of PE investment in generic pharmaceuticals. The future of Digital health – what to expect. What advice can seasoned GPs and LPs give to the new market entrants?

Participants

Moderator: Janke Dittmer - General Partner, Gilde Healthcare

Christoph Kausch - Managing Partner, MTIP AG

Ulrich Grabenwarter - Head of Private Equity, European Investment Fund

Henry Gladwyn - Principal, OMERS Ventures

Veteran LPs and GPs in private credit

15:35 - 16:15

Private Credit: Day Two

Comparing and contrasting the lessons learnt from the 2008/9 and 2020 crises. What behaviours and strategies prove resilient in times of crisis? Fundraising and due diligence – how is the pandemic changing the landscape and what does the future hold for LP/GP relations? 2020 and 2021 vintages – what are the expectations?

The LP view

The GP view

Participants

Frank Meijer - European Head of Alternative Fixed Income, Aegon Asset Management

Marco Natoli - Head of Lower Mid Market - Northern, Western and Southern Europe, European Investment Fund

Paul Shea - Managing Partner, Beechbrook Capital

In conversation with: James Newsome - Managing Partner, Harbour Partners

Peter Plaut - Executive Director, Wimmer Financial LLP

Connections: The pressure is on

15:50 - 16:30

Healthcare and Life Sciences: Connections

From deal sourcing, value creation and risk management to economic uncertainty and regulatory constraints: what is keeping dealmakers up at night?

LP/GP discussion group run under the Chatham House Rule. Open to 22 pre-registered LP and GP attendees. For GP registrations please email Rosemary.Fitzgerald@informa.com For LP registrations please email Krystal.Pierre@informa.com

Participants

Discussion leaders: Charles Boorady - Founding Managing Director, Health Catalyst Capital Management LLC

Sander Slootweg - Managing Partner, Forbion

Chair's closing remarks and end of SuperReturn Private Credit Europe 2021

16:20 - 16:25

Private Credit: Day Two

Chair's closing remarks & the end of Summit

16:30 - 16:35

Healthcare and Life Sciences: Day Two

Participants

Kelly DePonte - Managing Director, Probitas Partners

SCHEDULE

DAY THREE - 03/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

TIME	HEALTHCARE AND LIFE SCIENCES: CONNECTIONS	HEALTHCARE AND LIFE SCIENCES: DAY TWO	PRIVATE CREDIT: CONNECTIONS	PRIVATE CREDIT: DAY TWO
09:00		09:30 - Chair's opening remarks 09:40 - Present and future		09:30 - Chair's opening remarks 09:40 - The proliferation of niche and specialty finance: taking advantage of the market dislocation
10:00		10:15 - Drug and medical device discovery and commercialization 10:50 - Regenerative medicine		10:15 - Asset-backed lending in private markets: an underestimated strategy? 10:45 - Dedicated networking time
11:00		11:15 - Dedicated networking time 11:45 - Digital therapeutics and digital drugs		11:15 - ESG and impact investment: time to walk the walk?
12:00		12:25 - The good, the bad and the ugly of fundraising in COVID times	12:45 - Connections: Considerations for investing in a low interest rates environment	12:05 - Governments vs banks vs private credit managers: the evolving dynamics of competition and market share 12:45 - Dedicated networking time
13:00		13:00 - Dedicated networking time 13:30 - Technological innovation		13:15 - Secondaries: a new pool of opportunities as we head into another year of dislocations
14:00		14:10 - Healthcare IT 14:45 - Dedicated networking time		14:00 - The new risk metrics: how are GPs and LPs protecting their positions? 14:30 - Dedicated networking time
15:00	15:50 - Connections: The pressure is on	15:15 - Emerging trends and final thoughts		15:00 - Strategies for the next interest rate and economic cycles 15:35 - Veteran LPs and GPs in private credit
16:00		16:30 - Chair's closing remarks & the end of Summit		16:20 - Chair's closing remarks and end of SuperReturn Private Credit Europe 2021

SESSIONS

DAY FOUR - 04/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Chair's opening remarks

09:30 - 09:40

Secondaries

Participants

Carlo Pirzio-Biroli - Managing Partner & CEO, Glendower Capital

Chair's opening remarks

09:30 - 09:35

Renewables

What is the secondary market today? Did anyone see it coming?

09:40 - 10:10

Secondaries

A walk along memory lane to the present – how the secondary market got to where it is today

Participants

Nigel Dawn - Senior Managing Director, Global Head of Private Capital Advisory, Evercore

Interviewed by: Jeff Hammer - Senior Managing Director and Global Co-Head of Secondaries, Manulife Investment Management

Renewables: busting the boundaries of infrastructure as interest in carbon-neutral and sustainable investing grows?

09:40 - 10:10

Renewables

How are returns being affected by capital flooding into traditional infrastructure areas such as wind and solar power? How will behavioural changes caused by COVID-19 impact demand?

Participants

Moderator: Verena Kempe - Head of Investment Management, KENFO

Panellists: Minesh Mashru - Co-Head of Infrastructure, Real Assets Investment Group, Cambridge Associates

Karl Smith - Managing Director, Macquarie Group

Werner von Guionneau - Chief Executive Officer, InfraRed Capital Partners

Evolution or revolution? The impact of GP-led transactions on deal-making in the M&A and secondary markets

10:15 - 10:45

Secondaries

Predicting the future of GP-led deals as the coronavirus pandemic pushes more buyout groups to find ways to hold on to good assets and provide liquidity to LPs. What are implications for bankers and the co-investment market? Do M&A bankers need to develop new skills on how to source GP led deals?

Participants

Moderator: Francesca Paveri Fontana - Managing Director, Private Capital Advisory Group, Evercore

Panellists: Nicolas Schellenberg - Managing Director, Cambridge Associates

J.David Enriquez - Head of Private Equity, New York City Retirement Systems

Patrick Knechtli - Head of Secondaries, Aberdeen Standard Investments

Matt Jones - Partner, Co-Head of Global Secondaries, Pantheon

Keynote interview: Renewable energy in Europe – a sector at an inflection point

10:15 - 10:45

Renewables

Over the last 15 years renewables have moved from the fringes to the centre of Europe's power generation mix. Impax believes Europe is leading the way in terms of renewables growth and is transitioning fastest amongst its regional counterparts. Further, emerging related sectors offer diversification benefits and a range of investment opportunities. However, while the investment opportunity is larger, wider and better proven than in the past, new energy infrastructure in Europe remains a complex sector from which to extract value.

Participants

Daniel von Preyss - Executive Director, Head of Private Equity/Infrastructure, Impax Asset Management

Interviewed by: Tavneet Bakshi - Partner & Head of EMEA, First Avenue

The rise, brief fall and rise of LP transactions: what to expect in 2021

10:50 - 11:20

Secondaries

LP-led secondaries: still the core of the secondaries market? Examining different LP allocation models - where is the greatest/least demand and how is alignment on pricing being achieved?

Participants

Moderator: Bernhard Engeli - Managing Director, Co-Head of European Capital Advisory, Greenhill & Co. International LLP

Panellists: Dushy Sivanithy - Managing Director, Head of Secondaries, CPPIB

Cari Lodge - Managing Director, Commonfund Capital

Carlo Pirzio-Biroli - Managing Partner & CEO, Glendower Capital

Oliver Gardey - Head of Private Equity Fund Investments, ICG Enterprise Trust

Developments in distributed assets and the intersection with sustainability and climate risk

10:50 - 11:20

Renewables

Examining opportunities in rooftop solar, waste to energy systems, waste water treatment. Is there a demand/supply imbalance for renewable operating assets? Are current return expectations realistic? Where do investors expect opportunities in the next 5 years? Discussing the impact of climate transition. How can managers show their investors that transformation is working?

Participants

Moderator: Eugene Zhuchenko - Founder, ETORE Advisory

Panellists: Jason Zibarras - Founding Partner, Argo Infrastructure Partners

Bernd Kreuter - Managing Partner & Co-Founder, Palladio Partners

Natalie Adomait - Senior Vice President, Brookfield

Barbara Weber - Founding Partner, B Capital Partners

Isela Bahena - Managing Director, Private Infrastructure, Nuveen Real Assets and Infrastructure

Dedicated networking time

11:20 - 11:50

Secondaries

Dedicated networking time

11:20 - 11:50

Renewables

SESSIONS

DAY FOUR - 04/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Culture conflict? The very real differences between European and North American secondary transactions, both GP-led and LP-led transactions

11:50 - 12:20

Secondaries

Is the strategy gaining traction or will banks and debt funds prevail in offering an alternative source of equity financing to bridge funding challenges?

Participants

Moderator: Philippe Ferneini - Managing Director, StepStone Group

Panellists: Immanuel Rubin - Partner, Campbell Lutyens

Johanna Lottmann - Managing Director, PJT Park Hill

Steve Nicholls - Partner & CIO, Hollyport Capital

Nik Morandi - Managing Director, Strategic Partners, Blackstone

Traditional renewables: are returns compressing?

11:50 - 12:20

Renewables

How to make renewable energy generation an investable market in the context of low energy prices:

What role will renewables funds play in the future energy landscape? What is the demand for renewables as prices and returns drop, who is creating value and where are the best opportunities?

Participants

Moderator: Alex O'Connell - Founder & CEO, Gore Street Capital

Panellists: Diego Jimenez - Principal, HarbourVest Partners

Petar Atanasov - Vice President, BAC Securities

Rosheen McGuckian - CEO, NTR

Shane Swords - Managing Director, Head of Investor Relations, NextEnergy Capital

Beyond COVID: a framework for resilience in secondary investing

12:25 - 13:00

Secondaries

Constructing a portfolio to perform well in both economic downturns and subsequent periods of outperformance

Participants

Moderator: Mark McDonald - Global Head, DWS Private Equity

Panellists: Valérie Handal - Managing Director, HarbourVest Partners

Paul Newsome - Partner, Head of Investment Solutions, Unigestion

Vladimir Balchev - Director, Hayfin Capital Management LLP

Pinal Nicum - Partner, Adams Street Partners

European renewables: country-focused versus pan-European strategies

12:25 - 13:00

Renewables

Comparing generalist sector-focused funds with more specialist regional vehicles. Which subsectors have developed the most and in which geographies?

Participants

Moderator: Joana Castro - Principal, Unigestion

Panellists: Jessica Otte - Director, StepStone Group

Carl-Emil Lindholm - Director, Country Lead - Sweden, Infranode

Laurence Monnier - Head of Quantitative Research, Real Assets, Aviva Investors

Dedicated networking time

13:00 - 13:30

Secondaries

Connections: GP-Led Deals

13:00 - 14:00

Secondaries: Connections

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email chloe.elliott@informa.com.

Participants

Discussion leaders: J. David Enriquez - Head of Private Equity, New York City Retirement Systems

Matt Jones - Partner, Co-Head of Global Secondaries, Pantheon

Dedicated networking time

13:00 - 13:30

Renewables

Everything you always wanted to ask about secondaries but were afraid to ask!

13:30 - 14:00

Secondaries

What's in store for the secondaries market in 2021?

Participants

Moderator: Marco Wulff - Managing Partner & Co-Founder, Montana Capital Partners

Panellists: Laura Shen - Partner & Co-Founder, Headway Capital Partners

Neal Costello - Managing Director, Alpinvest Partners

Pablo Caló - Managing Partner, Fairview Capital Group

Global investment themes driven by the energy transition

13:30 - 14:00

Renewables

Participants

Pooja Goyal - Partner, Co-Head of Infrastructure, The Carlyle Group

Interviewed by: Brian Eckhouse - Energy Reporter, Bloomberg News

SESSIONS

DAY FOUR - 04/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

The evolving private equity capital structure: what's pref got to do with it?

14:05 - 14:35

Secondaries

What are the benefits of preferred equity? Is the strategy gaining traction or will banks and debt funds prevail in offering an alternative source of equity financing to bridge funding challenges?

Participants

Moderator: Doug Cruikshank - Head of Fund Financing and Hark Capital, Aberdeen Standard Investments

Panellists: Robert de Corainville - Partner, 17Capital

André Aubert - Partner and Co-head, Secondaries, LGT Capital Partners

David F. Philipp - Managing Director, Senior Portfolio Manager, Crestline Investors

Is a renewables fund automatically ESG friendly?

14:05 - 14:35

Renewables

Do renewables tick the Social and Governance boxes as well as the Environmental? The importance of identifying projects/assets that are beneficial to communities and which emphasise diversity.

Participants

Moderator: Nikolas Stone - Manager, ESG Impact, CDC Group

Panellists: Luigi Pettinicchio - Co-Founder & CEO, Asper Investment Management

Alena Antonava - Investment Manager, Long Term Income Fund, RPMI Railpen

Scott Mackin - Managing Partner, Denham Capital

Sean Maguire - Managing Director, Private Equity/Infrastructure, Impax Asset Management

Dedicated networking time

14:35 - 15:05

Secondaries

Dedicated networking time

14:35 - 15:05

Renewables

Connections: Examining new forms of energy

14:35 - 15:05

Renewables: Connections

This informal session brings LPs and GPs together in a closed setting to network and discuss crisis management. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees

What sophisticated LPs want from secondaries in 2021: changes from the early days

15:05 - 15:35

Secondaries

Participants

Moderator: Paul Sanabria - Global Co-Head of Secondaries, Private Markets, Manulife Investment Management

Panellists: Steve Moseley - Deputy CIO and Head of Private Markets and Alternative Investments, Alaska Permanent Fund Corporation

David Chu - Senior Investment Officer, LACERA

Private equity strategies in renewables

15:05 - 15:35

Renewables

Participants

Moderator: J. David Enriquez - Head of Private Equity, New York City Retirement Systems

Panellists: Pierre Abadie - Co-Head of the Energy Transition Practice, Tikehau Capital

Elena Savostianova - Managing Partner, Ember Infrastructure Partners

Ken Pontarelli - CIO and Head of the Sustainable Investing Group, Goldman Sachs

Innovation on display – what's the next big "thing" in the secondary market?

15:40 - 16:10

Secondaries

Constructing a portfolio to perform well in both economic downturns and subsequent periods of outperformance

Participants

Moderator: Nash Waterman - Head of Private Equity Secondaries, Morgan Stanley Investment Management

Panellists: Yann Robard - Managing Partner, Whitehorse Liquidity Partners

Andrew Hawkins - Head of Private Equity Solutions, Intermediate Capital Group

Dadong Yan - Portfolio Manager, Alternative Investments, MassMutual

Christophe Nicolas - Managing Director, Secondary Investments, Alpinvest Partners

Specialist vs. diversified managers – who is best placed to win at renewables?

15:40 - 16:10

Renewables

Participants

Moderator: Yves Meyer Buelow - Managing Director, Infrastructure Investments, Allianz Capital Partners

Panellists: Raj Rao - Partner, Global Infrastructure Partners

Lucy Heintz - Partner, Actis

Steen Lønberg Jørgensen - Partner, Copenhagen Infrastructure Partners (CIP)

Harsh Agrawal - Partner, I Squared Capital

Chair's closing remarks & the end of the Secondaries Day 2021

16:10 - 16:15

Secondaries

Renewable debt funds: Who are the new entrants into the debt market?

16:15 - 16:45

Renewables

What is the lower for longer interest rate environment impact on renewables? Why wouldn't you refinance at these low rates? Has COVID 19 increased the risk of default in highly leveraged situations?

Participants

Moderator: Jérôme Neyroud - Head of Infrastructure Debt & Deputy CEO, Schroder AIDA, Schroders

Panellists: Severin Hiller - Co Head of Infrastructure Debt, Rivage Investment

Tim Cable - Senior Partner, Vantage Infrastructure

Torsten Heidemann - Head of Infrastructure & Energy, Berenberg

Chair's closing remarks & the end of the European Renewables Day 2021

16:50 - 16:55

Renewables

SCHEDULE

DAY FOUR - 04/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

TIME	RENEWABLES	RENEWABLES: CONNECTIONS	SECONDARIES	SECONDARIES: CONNECTIONS
09:00	<p>09:30 - Chair's opening remarks</p> <p>09:40 - Renewables: busting the boundaries of infrastructure as interest in carbon-neutral and sustainable investing grows?</p>		<p>09:30 - Chair's opening remarks</p> <p>09:40 - What is the secondary market today? Did anyone see it coming?</p>	
10:00	<p>10:15 - Keynote interview: Renewable energy in Europe – a sector at an inflection point</p> <p>10:50 - Developments in distributed assets and the intersection with sustainability and climate risk</p>		<p>10:15 - Evolution or revolution? The impact of GP-led transactions on deal-making in the M&A and secondary markets</p> <p>10:50 - The rise, brief fall and rise of LP transactions: what to expect in 2021</p>	
11:00	<p>11:20 - Dedicated networking time</p> <p>11:50 - Traditional renewables: are returns compressing?</p>		<p>11:20 - Dedicated networking time</p> <p>11:50 - Culture conflict? The very real differences between European and North American secondary transactions, both GP-led and LP-led transactions</p>	
12:00	<p>12:25 - European renewables: country-focused versus pan-European strategies</p>		<p>12:25 - Beyond COVID: a framework for resilience in secondary investing</p>	
13:00	<p>13:00 - Dedicated networking time</p> <p>13:30 - Global investment themes driven by the energy transition</p>		<p>13:00 - Dedicated networking time</p> <p>13:30 - Everything you always wanted to ask about secondaries but were afraid to ask!</p>	13:00 - Connections: GP-Led Deals
14:00	<p>14:05 - Is a renewables fund automatically ESG friendly?</p> <p>14:35 - Dedicated networking time</p>	<p>14:35 - Connections: Examining new forms of energy</p>	<p>14:05 - The evolving private equity capital structure: what's pref got to do with it?</p> <p>14:35 - Dedicated networking time</p>	
15:00	<p>15:05 - Private equity strategies in renewables</p> <p>15:40 - Specialist vs. diversified managers – who is best placed to win at renewables?</p>		<p>15:05 - What sophisticated LPs want from secondaries in 2021: changes from the early days</p> <p>15:40 - Innovation on display – what's the next big "thing" in the secondary market?</p>	

SCHEDULE

DAY FOUR - 04/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

TIME	RENEWABLES	RENEWABLES: CONNECTIONS	SECONDARIES	SECONDARIES: CONNECTIONS
16:00	<p>16:15 - Renewable debt funds: Who are the new entrants into the debt market?</p> <p>16:50 - Chair's closing remarks & the end of the European Renewables Day 2021</p>		<p>16:10 - Chair's closing remarks & the end of the Secondaries Day 2021</p>	

SESSIONS

DAY FIVE - 05/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Connections: How private equity co-investments can accelerate investor returns following a crisis

09:00 - 10:00
Connections Day

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion Leaders: **Gonzalo Erroz** - Partner, Hayfin Capital Management LLP

Mark McDonald - Global Head, DWS Private Equity

Connections: Changing the way things are done

10:00 - 11:00
Connections Day

Global asset managers have a responsibility to protect our world. How? Engaging with companies and other key stakeholders to protect our global heritage.

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leader: **Peter Plaut** - Executive Director, Wimmer Financial LLP

LP ONLY DISCUSSION Connections: Future of LP-Led Secondaries

11:00 - 12:00
Connections Day

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 **Chloe Elliott** at chloe.elliott@informa.com

Participants

Discussion Leaders: **Nicolas Schellenberg** - Managing Director, Cambridge Associates

Philippe Ferneini - Managing Director, StepStone Group

Christian Böhler - Partner, Unigestion

Connections: Distressed investing

12:00 - 13:00
Connections Day

What is the scale of opportunities for distressed investing in the post-pandemic era? How are GPs and LPs balancing risk and return when looking at distressed debt? What are the best practices for achieving a successful turnaround?

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leaders: **Bradley Rowbotham** - Private Markets Research Consultant, NEPC

Peter Laib - Chairman, YIELCO Investments

Connections: Analysing the impact of COVID-19 on Healthcare and Life Sciences investments

14:00 - 15:00
Connections Day

How has the pandemic changed the investment landscape in the sector? Identify attractive investment targets that will benefit in the coming years. Globalisation of Pharmacovigilance: where are we at? COVID-19 as an opportunity to step up international collaboration

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leaders: **Tim Haines** - Chairman & Managing Partner, Abingworth LLP

Jeffrey Jay - Senior Managing Director, Great Point Partners

Kelly DePonte - Managing Director, Probitas Partners

Connections: Innovation in digital solutions for Healthcare and Life Sciences industry

15:00 - 16:00
Connections Day

Examining the fastest growing Healthtech and Deeptech technology areas. How can Private Equity act as a catalyst for further innovation? How has the pandemic affected the demand for and focus on digital solutions across the health and care systems: sharing practical examples.

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leaders: **Christoph Kausch** - Managing Partner, MTIP AG

Baudouin Hue - Partner, Karista

Shane Chesson - Partner, Openspace Ventures

SESSIONS

DAY FIVE - 05/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

Connections: Venture debt

16:00 - 17:00

Connections Day

Demystifying venture debt – benefits vs costs for investing in the asset class. Timing the market - is 2021 the best time to invest in venture debt?

This informal session brings LPs and GPs together in a closed setting to network and discuss the latest concerns facing GP structures and ownership. Run under the Chatham House Rule and open to 24 pre-registered LP and GP attendees. For GP registrations please email rosemary.fitzgerald@informa.com. For LP registrations please email savannah.charles@informa.com.

Participants

Discussion leaders: **Colton Lavin** - Senior Analyst, Private Markets, NEPC

Matthias Kirchgässner - Managing Partner, PLEXUS Research

End of SuperReturn Europe Virtual 2021

17:00 - 17:05

Connections Day

SCHEDULE

DAY FIVE - 05/03/2021

SuperReturn Europe Virtual

1 - 5 March 2021

Virtual Event

GMT (Greenwich Mean Time)

TIME	CONNECTIONS DAY
09:00	09:00 - Connections: How private equity co-investments can accelerate investor returns following a crisis
10:00	10:00 - Connections: Changing the way things are done
11:00	11:00 - LP ONLY DISCUSSION Connections: Future of LP-Led Secondaries
12:00	12:00 - Connections: Distressed investing
13:00	
14:00	14:00 - Connections: Analysing the impact of COVID-19 on Healthcare and Life Sciences investments
15:00	15:00 - Connections: Innovation in digital solutions for Healthcare and Life Sciences industry
16:00	16:00 - Connections: Venture debt
17:00	17:00 - End of SuperReturn Europe Virtual 2021