SESSIONS

DAY 1 - 02/02/2021

SuperTechnology North America

February 2-3, 2021
CST UTC -6 Time Zone
Virtual event

Dedicated networking time

08:30 - 09:25

Dedicated time to catch up with peers and business contacts.

Set your availability in the Eventfinity platform.

You can schedule 1-to-1 or group meetings in designated time slots.

All meetings will be held through a secure video conferencing solution.

Chair's welcome address

09:25 - 09:30
Day 1

Technology fundraising activity

09:35 - 09:55
Day 1

- How has fundraising in the US, Canada and Mexico been affected by Covid?
- What does 'normal' look like now?
- Which funds and areas of the market have benefited or struggled the most?
- Will 2021 be the year of the tech fundraise?
- How might 2020/21 funds compare with other vintages?
- How many new tech funds have entered the market?

Participants

Jesse Fahy - Vice President, Private Capital, Preqin

The LP perspective: technology funds and investments

10:00 - 10:20
Day 1

- How are LPs accessing Buyout, Growth and VC tech investments through their existing GP relationships?
- How are LPs accessing oversubscribed technology funds?
- Are LPs comfortable with making investments in managers they have never invested in before in the current climate?
- How has the commitment and draw-down process changed?
- How have LPs pushed for liquidity in 2020?
- What long-lasting changes have LPs because of Covid?
- VC, Growth, or Buyout – what are LPs preferring now?

Participants

Jonathan Grabel - Chief Investment Officer, LACERA (Los Angeles County Retirement Association)

Technology investing today: Buyout perspectives

10:25 - 11:00
Day 1

- What are the different ways the 'tech sector' can be segmented?
- Isn't everything a tech investment today?
- What valuations and risks are acceptable when approaching a new tech investment?
- How are underlying assets being transformed by technological innovation?
- Is the tech sector in a bubble?
- Tech businesses vs tech-enabled businesses: where's the line?

Participants

In conversation with: Marc der Kinderen - Managing Partner, 747 Capital

Daniel Berglund - Partner, Technology & Payments, Nordic Capital

Networking break

11:00 - 11:45
Day 1

While you wait for the next session, stay tuned for our exclusive interviews

CONNECTION SESSION 1: Covid-19 impact – where next for tech investors?

11:00 - 11:45
Connection Session

LP/GP networking session run under the Chatham House Rule. Open to 26 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

Eugene Zhang - Founding Partner, TSVC

The online debate: LP-GP relations today

11:45 - 12:10
Day 1

Has tech permanently replaced the need for in-person meetings between LPs and GPs? Will competitors have an edge if they take meetings 'offline'? How can LPs and GPs build solid relationships in the new online world? Can LPs do effective due diligence on a manager without ever meeting them?

- The LP view: LP 1 and LP 2 in conversation with (15 minutes)
- The GP view: GP 1 and GP 2 in conversation with (15 minutes)
- + 10minute Q&A

Participants

Moderator: Kelly DePonte - Managing Director , Probitas Partners

Panellists: Steven Hartt - Principal, Meketa Investment Group

Matt Diestel - Investment Director, QIC Global Private Capital

Eliot Hodges - Chief Executive Officer and Co-Founder, Anduin

GPs originating, diligencing and managing companies digitally

12:15 - 12:50
Day 1

In what ways have new GPs had to change their origination and valuation processes? To what extent can the difficulties of meeting founders and doing in-person due diligence be mitigated by technology? Is there a push for better automating investment, monitoring and management processes of portfolio companies? How have companies and supply chains which have been negatively affected by the pandemic used technology to mitigate some of the issues? In what ways have new GPs had to change their process to manage deal-flow?

Participants

Moderator: Joncarlo Mark - Founder & Managing Member, Upwelling Capital Group

The LP view: Brian Schuman - Investment Professional, PepsiCo Technology Ventures

The LP view: Eric Woo - Head of Institutional Capital, AngelList

The Buyout view: David Fishman - Head of Investment Team, Vector Capital

The VC and Growth view: Rudina Seseri - Founder and Managing Partner, Glasswing Ventures

Networking break

12:50 - 13:35
Day 1

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CONNECTION SESSION 2: Sector focus: where's the opportunity?

12:50 - 13:35
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"Nothing stays private for long": the technology IPO today

13:35 - 14:10
Day 1

- Are software and 'pure-tech' investments the best place to find a deal that will eventually go public?
- Which sectors are seeing the most successful IPOs?
- To what degree are public markets still volatile?
- Are traditional routes to an IPO better than a SPAC?
- Are relative valuations too high?
- Direct listings vs IPO vs traditional IPO – which is better?

Participants

Moderator: Bradley Rowbotham - Research Consultant, Private Markets, NEPC

Panellists: Rami Reyes - Co-Founder & Managing Director, NextEquity Partners

Sunil Dhaliwal - General Partner, Amplify Partners

Michael Block - Managing Director and Special Advisor, Adit Ventures LLC

Technology creating diversity: using new tools to create diverse teams

14:15 - 14:45
Day 1

- How has the ability to work from home and remotely enabled the widening of the workforce?
- What opportunities and challenges has tech created for leaders managing teams?
- Is the future of work here to stay?
- Has the work/life balance been thrown out of the window?

Participants

Interviewer: Dadong Yan - Portfolio Manager, MassMutual

Interviewee: Cindy Padnos - Founder & Managing Partner, Illuminate Ventures

Networking break

14:45 - 15:30
Day 1

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CONNECTION SESSION 3: What's happening in GP-led Secondaries?

14:45 - 15:30
Connection Session

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Participants

Discussion Leader: Cari Lodge - Managing Director, Commonfund Capital

LP views on technology: from investments to operations

15:30 - 16:00
Day 1

- How is tech impacting fund analysis and manager due diligence?
- How are over allocated LPs approaching tech as an investment possibility?
- Does the growth of tech disruption to underlying assets concern LPs?
- What is the demand for proven tech investment today?

Participants

Moderator: Chris Sparenberg - Director, Product and Data Strategy, IHS Markit

Panellists: Josh Geller - Deputy City Attorney, Public Pensions General Counsel Division, Los Angeles City Attorney

Maurice Gordon - Managing Director & Head Of Private Equity, The Guardian Life Insurance Company Of America

David Rutledge - Portfolio Manager Private Markets Group, OP Trust

No longer flying-over opportunity: the VC ecosystem and North American tech

16:05 - 16:40
Day 1

- Where are start-ups and different VCs finding tech opportunities?
- How has the ecosystem become decentralized?
- How are VCs providing strategic vision today?
- What does the diligence on a VC vs Growth vs Buyout look like?
- Are sector specialists more spread out today (post-pandemic)?
- When does it make sense to go from local specialists to more generalist investor?

Participants

Moderator: Justin Field - Senior Vice President of Government Affairs, National Venture Capital Association (NVCA)

Panellists: Steve Case - Chairman & CEO, Revolution LLC

Priscilla Guevara - Head of Investor Relations, Science Inc.

Mike Venerable - CEO, CincyTech

Chair's closing remarks and end of SuperTechnology North America Virtual Day 1

16:45 - 16:50

Day 1 Afternoon Dedicated Networking Time

16:50 - 17:45

Dedicated time to catch up with peers and business contacts.

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SuperTechnology North America

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08:00	**08:30** - Dedicated networking time	**08:30** - Dedicated networking time
09:00		**09:25** - Chair's welcome address **09:35** - Technology fundraising activity
10:00		**10:00** - The LP perspective: technology funds and investments **10:25** - Technology investing today: Buyout perspectives
11:00	**11:00** - CONNECTION SESSION 1: Covid-19 impact – where next for tech investors?	**11:00** - Networking break **11:45** - The online debate: LP-GP relations today
12:00	**12:50** - CONNECTION SESSION 2: Sector focus: where's the opportunity?	**12:15** - GPs originating, diligencing and managing companies digitally **12:50** - Networking break
13:00		**13:35** - "Nothing stays private for long": the technology IPO today
14:00	**14:45** - CONNECTION SESSION 3: What's happening in GP-led Secondaries?	**14:15** - Technology creating diversity: using new tools to create diverse teams **14:45** - Networking break
15:00		**15:30** - LP views on technology: from investments to operations
16:00	**16:45** - Chair's closing remarks and end of SuperTechnology North America Virtual Day 1 **16:50** - Day 1 Afternoon Dedicated Networking Time	**16:05** - No longer flying-over opportunity: the VC ecosystem and North American tech **16:45** - Chair's closing remarks and end of SuperTechnology North America Virtual Day 1 **16:50** - Day 1 Afternoon Dedicated Networking Time

SESSIONS

DAY 2 - 03/02/2021

SuperTechnology North America

February 2-3, 2021
CST UTC -6 Time Zone
Virtual event

Dedicated networking time

08:15 - 09:15

Dedicated time to catch up with peers and business contacts.

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Chair's opening remarks

09:15 - 09:20
Day 2

Participants

Aaron Filbeck - Director, Global Content Development, CAIA Association

The future of technology and private markets in North America

09:25 - 09:45
Day 2

- What are some of the global tech trends that are potentially impacting tech investments in North America? How has the US economy fared under Covid, and what's next?
- What does the current interest rate environment mean for LPs and their funds?
- To what degree are key sector economics (travel, real estate, oil prices, manufacturing etc) still affected by the pandemic? What tech projects are in the political firing line?
- What are the current big tech trends within North America?

Participants

Cian Cotter - Managing Director, Insight Partners

Is 20x EBITDA the new 15x: Staying disciplined in technology investing

09:50 - 10:10
Day 2

Participants

Rich Lawson - Chairman, Chief Executive Officer and Co-Founder, HGGC

Looking beyond the code: the truth behind digital and technological innovation in North America

10:15 - 10:35
Day 2

Participants

Christian Kallen - Managing Director and Co-Head of Fund Investment Team, Hamilton Lane

In conversation with: Neil Malik - Founder, K1

Networking break

10:35 - 11:20
Day 2

While you wait for the next session, stay tuned for our exclusive interviews

CONNECTION SESSION 4: Current valuation methods – no longer fit for purpose?

10:35 - 11:20
Connection Session

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Participants

Discussion Leaders: Michele Kinner - Senior Advisor - Fund Investments, Quilvest Private Equity

Tiffany Lee - Vice President, Invesco Private Capital

A CEO and its VC Share How Tech Startups Transform Our Post Pandemic Future

11:20 - 11:50
Day 2

- What are challenges that every tech business needs to overcome?
- How has the pandemic created innovation, sales and efficiencies?
- What are founders looking for when trying to attract PE capital post-VC investment?
- How do GPs build a great relationship with a founder-CEO?
- How have management teams operated and adapted during the pandemic?

Participants

Interviewer: Mark Suster - Managing Partner, Upfront Ventures

Interviewee: Sarah Dorsett - CEO, Nanit

Adopting a new member: Family Offices investigating technology investments

11:55 - 12:30
Day 2

- Do families consider technology investments a high-risk opportunity in today's climate?
- What proportion of family's are looking at Micro-VC funds now? How have diligence methods changes in the wake of Covid?
- How are specialist managers being selected for sectors of interest impacted by new tech?
- Where are families looking to do direct deals?

Participants

Moderator: Heinz Blennemann - Principal, Blennemann Family Investments

Panellists: Randy Norton - Managing Partner, Global Head of Real Estate and Alternative Investments, Green Mesa Capital

Clark Cheng - CEO & CIO, Merrimac Corp

Chris Winiarz - CIO, Lakeview Capital

Best practice tech for institutional and family office investors

12:35 - 13:05
Day 2

Participants

Logan Allin - Managing General Partner, Fin VC

CONNECTION SESSION 5: LP-GP relations – what does "good" look like today?

13:00 - 13:45
Connection Session

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Participants

Host: Brett Hickey - Founder & CEO, Star Mountain Capital

Networking break

13:05 - 13:45
Day 2

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SESSIONS
DAY 2 - 03/02/2021

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Covid, competition, and China in 2021

13:45 - 14:05
Day 2

- What are the lasting effects of the pandemic for LPs, GPs, and their investments?
- In what ways has opportunities for investing in Chinese-tech, and for China investing in US-tech, changed?
- What different geographies and sectors are GPs looking for exposure to now? Where are LPs rebalancing their assets and divesting?
- How are LPs getting into great funds, and GPs competing for new investment?

Participants

Chris Hayes - Senior Policy Counsel, Institutional Limited Partners Association (ILPA)

In conversation with: Jason Tan - Chief Investment Officer, Jeneration Capital

Melissa Ma - Co-Founder and Managing Partner, Asia Alternatives Management LLC

SPAC to the future: the pros and cons of Buyouts using a Special-Purpose Acquisition Company

14:10 - 14:40
Day 2

- How is valuing a SPAC different to other growth and tech investments?
- Is a SPAC a better public option for a technology investment than an IPO?
- What are the real benefits of SPAC after an exit?
- Which kind of SPACs are LPs best suited for?
- What are the possible conflicts of interest for GP and SPACs?

Participants

John Crocker - Head of Business Development, 57 Stars

In conversation with: Eric Benhamou - Founder & General Partner, Benhamou Global Ventures

Chris Ho - Associate Director, Vickers Venture Partners

Emerging managers and emerging sectors: specialization vs generalist approaches

14:45 - 15:25
Day 2

- How are ‘emerging managers’ and ‘emerging tech’ being defined today?
- In what ways is the new manager in tech landscape changing?
- Is emerging technology in a bubble?
- Who is the next generation of investor?

Participants

Moderator: Mike Dutton - COO, Capital Group Private Markets

Panellists: Simon Wu - Investment Director, Cathay Innovation

Laura Thompson - Principal, Sapphire Ventures

Chad Summe - Managing Partner, eGateway Capital

Ami Samuels - Partner, Gatewood Capital Partners

Networking break

15:25 - 16:15
Day 2

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Connection 6: Answering questions from CIOs – how do other LPs do it?

15:25 - 16:15
Connection Session

LP-only session

LP only networking session run under Chatham House Rule. Open to 26 pre-registered LP attendees. To register please email savannah.charles@informa.com

Participants

Discussion Leader: Ziad Sarkis - Director of Financial Research, Alternative Investments Initiative, The Wharton School - University of Pennsylvania

Making an impact: putting the ‘Technology’ into ESG

16:15 - 16:45
Day 2

- How are GPs optimizing investment returns and societal impact through technological innovation?
- How do you quantify ESG using technology?
- What are the realities of modelling a technology investment’s impact?
- In what ways is technology improving portfolio company diligence when looking at ESG factors?

Participants

Moderator: Nicholas d’Adhemar - CEO, Apperio

Panellists: Ben Belldegrun - Managing Partner, Pontifax AgTech

Andrew Chung - Founder & Managing Partner, 1955 Capital

Rishi Kotecha - Head of Commercial Strategy, Private Equity, IHS Markit

Growing, growing gone! What has the pandemic done for growth capital in technology?

16:50 - 17:25
Day 2

- How do LPs get into growth opportunities early?
- How much has been raised and how many firms have exited during the pandemic?
- How quickly are funds being raised and capital being deployed?
- How favorably are investors looking at growth capital strategies in technology?
- Which sectors offer the most attractive investment opportunities for growth capital GPs?
- What are some of the risks and opportunities on the horizon?

Participants

Moderator: Sunaina Sinha - Managing Partner, Cebile Capital

Panellists: Shari Young Lewis - Associate Partner, Private Equity, Aon Investments

Zak Schwarzman - General Partner, MetaProp

Scott Dubin - Director, ff Venture Capital

Chair’s closing remarks and end of SuperTechnology North America Virtual Day 2

17:25 - 17:35

Dedicated networking time

17:35 - 18:30

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