

SESSIONS

DAY ONE: PRIVATE CREDIT - 04/05/2021

SuperReturn North America Virtual

May 4-6, 2021
CT/UTC -5 Time Zone
Virtual event

Dedicated networking time

8:20am - 9:15am

Day One: Private Credit

Dedicated time to catch up with peers and business contacts. You can schedule one-to-one or group meetings in designated time slots. All meetings will be held through a secure video conferencing solution.

Chair's welcome address

9:15am - 9:20am

Day One: Private Credit

Participants

Randy Schwimmer - Senior Managing Director, Co-Head of Senior Lending, Churchill Asset Management

Jason Strife - Head of Junior Capital and Private Equity Solutions, Churchill Asset Management

COVID-19 as a catalyst for growth: what will 'getting back to normal' look like for private credit?

9:20am - 10:00am

Day One: Private Credit

Assessing the state of the market as the world starts to emerge out of the pandemic – how are strategies, structures and expectations changing? What shape and form is the recovery beginning to take? Are we seeing a snapback to any pre-pandemic trends? What does the future hold for private credit now that it has successfully passed its first stress test?

Participants

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

Panelists: David Colla - Managing Director & Head of Americas Leveraged Finance, CPP Investments

Adam Hagfors - Chief Investment Officer and Managing Partner, Silverpeak Credit Partners

Peter Glaser - Head of European Direct Lending, Alcentra Limited

Wesley Pulisic - Head of Alternative Credit, NYC Comptroller

Private credit's exceptional decade – evolution from a niche to mainstream asset class

10:05am - 10:25am

Day One: Private Credit

2020 in review – assessing private credit's performance during the pandemic, success stories and lessons learned. What are the drivers for the evolution of private credit from a niche into an established asset class? What are the most promising private credit strategies and which one(s) are the biggest contenders to become as big as direct lending? Projections for the performance – what type of return can private credit generate in the next few years?

Participants

Dan Pietrzak - Partner, Co-Head of Private Credit, KKR

Interviewed by: Eric Mogelof - Partner, Head of Client and Partner Group, KKR

Dedicated networking time

10:25am - 11:10am

Day One: Private Credit

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Connections: Portfolio construction

10:25am - 11:10am

Connections Sessions

LP/GP networking session run under the Chatham House Rule. Open to 26 pre-registered LP and GP attendees. For LP registration please email savannah.charles@informa.com. For GP registrations please email rosemary.fitzgerald@informa.com.

Participants

Discussion leader:: Mary Bates - Principal, Private Markets, Meketa Investment Group

Reading between the data: understanding the returns of private debt investments in a post-Covid world

11:10am - 11:40am

Day One: Private Credit

Participants

Christopher Godfrey - President, CEPRES

The opportunity set for investing in a post-pandemic world: how are GPs approaching new investments?

11:45am - 12:25pm

Day One: Private Credit

A look back at the pandemic – success stories and lessons learned. What are the expectations for company fundamentals – will earnings support high valuations on a go forward basis or are we at peak values? How are managers sourcing your deals – what collateral and assets are they targeting now compared to 12 months ago? How are GPs differentiating their products and strategies beyond interest rates and advanced rates ratios? What demands are managers getting from investors and are they taking on more risk to generate higher returns?

Participants

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

Panelists: Tim O'Hara - Global Co-Head of Credit, BlackRock

David M. Brackett - CEO, Antares Capital LP

Ian Fowler, CFA - Co-Head of Global Private Finance, Barings

Walter Owens - Chief Executive Officer, Varagon Capital Partners

Dedicated networking time

12:25pm - 1:10pm

Day One: Private Credit

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Connections: Private credit secondaries

12:25pm - 1:10pm

Connections Sessions

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Participants

Discussion leader:: Rick Jain - Global Head of Private Debt, Pantheon

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Private credit beyond a beta strategy: reasserting the attractiveness of the asset class

1:10pm - 1:50pm
Day One: Private Credit

Private credit vs private equity vs fixed income – comparing performance. How can investors looking to outperform the market generate alpha by allocating to private credit? The LP argument for investing in private credit - how are investors rating performance and returns?

Participants

Moderator: David Scopelleti - Global Head of Private Debt, Mercer Alternatives

Panellists: Milwood Hobbs, Jr. - Head of North American Sourcing & Origination, Oaktree Capital

Jennifer Hartviksen - Managing Director, Global Credit, IMCO

Kelli O'Connell - Head of Investor Solutions, NXT Capital

Greg Raczy - President, MGG Investment Group

The new LP mindset: searching for yield and safety in a sustained low rate environment

1:55pm - 2:35pm
Day One: Private Credit

Meeting allocation targets – how much capital are LPs looking to commit to private credit in the next 12 months and beyond? What types of strategies and managers are they allocating to? What are their considerations and requirements when making investment decisions? Given the run up in asset prices globally, what are investors expecting to see in terms of returns?

Participants

Moderator: Dan Cohn-Sfetcu - Managing Director, Portfolio Advisors

Panelists: Jeff Behring - Director Private Debt & Equity, Northwestern Mutual Capital

Brandon Laughren - Chief Investment Officer, The Laughren Group

Ryan Morse - Director, Alternative Investments, Pennsylvania State Employees' Retirement System

Shan Chen - Portfolio Manager, AZ PSPRS

Dedicated networking time

2:35pm - 3:20pm
Day One: Private Credit

Dedicated time to catch up with peers and business contacts. You can schedule one-to-one or group meetings in designated time slots. All meetings will be held through a secure video conferencing solution.

Connections: Venture debt and growth debt

2:35pm - 3:20pm
Connections Sessions

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Participants

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

Oliver Fadly - Research Consultant, Private Markets, NEPC

Spotlight on specialty and niche finance: what's the next big thing in private credit

3:20pm - 4:00pm
Day One: Private Credit

What advantages did the pandemic highlight for specialty finance vis-à-vis conventional strategies? What are the new market trends and opportunities, and emerging growth areas? How are LPs looking at the use of specialist strategies as a way to enhance their private credit portfolios without taking additional risk? How is the use of technology factoring in and improving specialty finance lending?

Participants

Moderator: Mark Perry - Managing Director, Wilshire Private Markets

Panelists: Avi Korn - Managing Director, Head of US Asset-Based Finance, KKR

David Flannery - Senior Managing Director, President, Vista Credit Partners

David Aidi - Partner, Atalaya Capital Management

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

Living up to the promise: what is next for distressed?

4:05pm - 4:45pm
Day One: Private Credit

Have activity and performance in the distressed space measured up to expectations over the past 12 months? How are GPs deploying the capital raised for distressed, special sits and opportunistic funds and how are they structuring deals and working out problem loans? With the phasing out of government support programs, what is the outlook for default activity in 2021 and beyond? Will we see more stressed or distressed assets come to market, and how are GPs and LPs preparing to capitalize on any opportunities?

Participants

Bradley Rowbotham - Private Markets Research Consultant, NEPC

In conversation with: Richard Fitzgerald - Co-Founder & Managing Partner, CapitalSpring

Cindy Chen Delano - Partner, Invictus Global Management

Chair's closing remarks

4:45pm - 4:50pm
Day One: Private Credit

End of Private Credit Day

Dedicated networking time

4:50pm - 6:55pm
Day One: Private Credit

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10:00AM	10:25am - Connections: Portfolio construction	10:05am - Private credit's exceptional decade – evolution from a niche to mainstream asset class 10:25am - Dedicated networking time
11:00AM		11:10am - Reading between the data: understanding the returns of private debt investments in a post-Covid world 11:45am - The opportunity set for investing in a post-pandemic world: how are GPs approaching new investments?
12:00PM	12:25pm - Connections: Private credit secondaries	12:25pm - Dedicated networking time
1:00PM		1:10pm - Private credit beyond a beta strategy: reasserting the attractiveness of the asset class 1:55pm - The new LP mindset: searching for yield and safety in a sustained low rate environment
2:00PM	2:35pm - Connections: Venture debt and growth debt	2:35pm - Dedicated networking time
3:00PM		3:20pm - Spotlight on specialty and niche finance: what's the next big thing in private credit
4:00PM		4:05pm - Living up to the promise: what is next for distressed? 4:45pm - Chair's closing remarks 4:50pm - Dedicated networking time

SESSIONS

DAY TWO: PRIVATE EQUITY - 05/05/2021

SuperReturn North America Virtual

May 4-6, 2021
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Dedicated networking time

8:00am - 9:05am

Day Two: Private Equity

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Welcome address

9:05am - 9:10am

Day Two: Private Equity

Fundraising bifurcation: a bridge too far?

9:10am - 9:30am

Day Two: Private Equity

How has fundraising in the US, Canada and Mexico been affected by COVID-19? Is the market too bifurcated for the middle market to exist? What does 'normal' look like now? Which funds and areas of the market have benefited or struggled the most? Is deal activity humming again? And will 2021 be this century's roaring 20s?

Participants

Presenter: Cameron Joyce - Vice President of Research Insights, Prequin

The LP perspective in North America

9:35am - 10:10am

Day Two: Private Equity

How are LPs accessing buyout, growth and VC tech investments through their existing GP relationships? How are LPs accessing oversubscribed 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 adopted because of COVID-19? VC, growth, or buyout – what are LPs preferring now?

Participants

Moderator: Michael Elio - Partner, StepStone Group

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

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

Scott Ramsower - Co-Head of Private Equity Fund Investments, Teacher Retirement System of Texas

State of the union: the future of North American private equity

10:15am - 10:50am

Day Two: Private Equity

What are the game changers facing private equity in the US and globally? What lessons have been learned from the pandemic and what are the lasting effects?

Participants

Susan Long McAndrews - Partner, Pantheon

In conversation with: Matt Cwiernia - Partner, Co-Head of Private Equity Group, Ares Management

Pete Stavros - Partner, Co-Head of North America Private Equity, KKR

Dedicated networking time

10:50am - 11:45am

Day Two: Private Equity

Dedicated time to catch up with peers and business contacts. You can schedule one-to-one or group meetings in designated time slots. All meetings will be held through a secure video conferencing solution.

Connections: Women in private markets

10:50am - 11:45am

Connections Sessions

When work/life balance gets thrown out of the window, what next? What are the next generation saying about the industry?

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Participants

Discussion Leader: Diane Flynn - Co-founder & CEO, Reboot Accel

Putting the macro under the microscope: what's the private market doing?

11:50am - 12:20pm

Day Two: Private Equity

When the short-term is risky, how do investors take the long view? Comparing 2008 and 2020, what's different and what's the same? Public-private partnerships how are these coming into play in different sectors? Where does a GP find an exit in this climate? How is 2020 benchmarked? Are we heading for a V shaped recovery? And with so much money chasing deals how are investors managing risk?

Participants

Moderator: Ben Leach - Head of Private Market Solutions, Willis Towers Watson

Panelists: Lauren Goodwin - Economist and Director of Portfolio Strategy, New York Life Investments

Trevor Rich - Partner, Lovell Minnick

Mark Sotir - President, Equity Group Investments

ESG as a competitive advantage

12:25pm - 12:55pm

Day Two: Private Equity

As ESG becomes a guiding framework for investment, how is it delivering an advantage and returns? How are diversified teams working differently, and better compared with their competitors? When and how do you change the boardroom to implement the right culture change? How do firms find more opportunities and create them? Where is the evolution going to happen next? Is there a way to leverage the benefits of being digital to curtail behavior biases? How is ESG being mandated as part of the investment and due diligence process?

Participants

Moderator: Peter Plaut - Executive Director, Wimmer Financial LLP

Panelists: Colin Etnire - Head of ESG, BC Partners

Ryan Nece - Co-Founder and Managing Partner, Next Play Capital

Paul Yett - Director of ESG & Sustainability, Hamilton Lane

Dedicated networking time

12:55pm - 1:35pm

Day Two: Private Equity

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Connections: Getting SPACs into focus: what are their value?

12:55pm - 1:35pm
Connections Sessions

How is valuing a SPAC different to other vehicles? Do LPs know what they are getting into? What are the possible conflicts of interest for GP and SPACs? Are they going to become more institutionalized in the market? How are SPACs getting their money to work? How do they fit in context with the rest of the public markets?

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Participants

Discussion Leaders: **John Crocker** - Head of Investor Relations, NovaQuest Capital Management

Howard D. Morgan - Managing Partner and Co-Founder, Argand Partners

A lightning rod for liquidity: how secondaries are becoming the primary option for GPs and LPs

1:35pm - 2:10pm
Day Two: Private Equity

How important is secondary investing to the modern asset management business? What do sophisticated LPs want from secondaries in 2021? Is there a concern that quality of deals won't catch up with quantity? Where is the inflection point for the market? Trends in secondaries: GP-led, LP-led, and GP-stakes.

Participants

Moderator: **Trey Muldrow** - Private Equity Partner, Weil, Gotshal & Manges LLP

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

Cari Lodge - Managing Director & Head of Secondaries, Commonfund Capital, Inc.

Nash Waterman - Managing Director & Head of AIP Private Equity Secondaries, Morgan Stanley Investment Management

Keynote interview

2:15pm - 2:35pm
Day Two: Private Equity

Participants

Joseph Baratta - Global Head of Private Equity, Blackstone

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

Each city is an empire: who and where are the new ecosystem creators in North America?

2:40pm - 3:15pm
Day Two: Private Equity

Where are the value-add and risk adjusted returns in today's market? What conditions create lift-off for a sector, that people tend to overlook? Is the new administration laying the groundwork for growth? What's the future of cities and how do infrastructure, transportation, 5G and private firms interlock? Can these be called frontier or emerging economies and how does each region compare to the rest of North America?

Participants

Moderator: **Karen Page** - General Partner, B Capital Group

Panelists: **Tom Bratkovich** - Sr. Vice President, Wilshire Associates

Christine Jones - Managing Partner, Blue Highway Growth Capital

Jennifer Vancini - General and Founding Partner, Mighty Capital

Dedicated networking time

3:15pm - 3:55pm
Day Two: Private Equity

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Connections: LP strategy comparison (LP-only discussion)

3:15pm - 3:55pm
Connections Sessions

What does different asset allocations look like now? What are LPs looking for from GPs now? How are LPs choosing the right re-ups? How do LPs get into oversubscribed funds? What's the view on emerging managers and spinouts?

Run under the Chatham House Rule and open to pre-registered development finance institutions, endowments, foundations, insurance companies, pension funds and sovereign wealth funds, subject to qualification. To register please email savannah.charles@informa.com.

Participants

Discussion Leader: **Dadong Yan** - Portfolio Manager, MassMutual

Contracts as a competitive advantage: optimize and manage your most important relationships

3:55pm - 4:15pm
Day Two: Private Equity

Fundraising and investing relationships are governed by contracts, yet those contracts are seldom optimized or effectively managed. How can precedent create simple and practical advantages? How can obligations be managed more efficiently to reduce the opportunity cost for your team? How can you move beyond compliance to proactive trust and relationship-building?

Participants

Jeff Bohl - CFO, InCloudCounsel

Specialist views: what now for different industries?

4:20pm - 4:50pm
Day Two: Private Equity

Is it better to be a generalist or keep to a sector-specialist investment focus? Is there a balance between the two? Are the sectors that have seen a boom in the last 12 months less investable now? Given market volatility, where have investments worked best? Which sectors and markets are becoming more interesting for LPs? Comparing healthcare, tech, crypto funds, automation, aerospace and real assets.

Participants

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

Panelists: **Jason Safran** - Senior Asset Manager, TCU Investment Management

Mark Steed - Chief Investment Officer, Arizona PSPRS Trust

Lu Zhang - Founder & Managing Partner, Fusion Fund

SESSIONS

DAY TWO: PRIVATE EQUITY - 05/05/2021

SuperReturn North America Virtual

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Getting back on the road for the first-time (and follow on) funds

4:55pm - 5:25pm

Day Two: Private Equity

What are some of the 'must-take' steps to prepare for a first fund? How do LP relationships change and evolve on the journey? Will a first thesis need to be 'perfect' for an anchor investor? What are the requirements of the fund team? And what do you need to do differently for the sophomore fund?

Participants

Moderator: Timothy Cunningham - President, Touchstone Group

Panelists: Susan Choe - Founder & Managing Partner, Katalyst Ventures

Michelle Jacobi - Managing Director, Gatewood Capital Partners

Brian Mesic - General Partner, Ankona Capital

Chair's closing remarks

5:25pm - 5:30pm

Day Two: Private Equity

End of Private Equity Day

Dedicated networking time

5:30pm - 7:05pm

Day Two: Private Equity

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8:00AM		8:00am - Dedicated networking time
9:00AM		9:05am - Welcome address 9:10am - Fundraising bifurcation: a bridge too far? 9:35am - The LP perspective in North America
10:00AM	10:50am - Connections: Women in private markets	10:15am - State of the union: the future of North American private equity 10:50am - Dedicated networking time
11:00AM		11:50am - Putting the macro under the microscope: what's the private market doing?
12:00PM	12:55pm - Connections: Getting SPACs into focus: what are their value?	12:25pm - ESG as a competitive advantage 12:55pm - Dedicated networking time
1:00PM		1:35pm - A lightning rod for liquidity: how secondaries are becoming the primary option for GPs and LPs
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4:00PM		4:20pm - Specialist views: what now for different industries? 4:55pm - Getting back on the road for the first-time (and follow on) funds
5:00PM		5:25pm - Chair's closing remarks 5:30pm - Dedicated networking time

SESSIONS

DAY THREE: ENERGY - 06/05/2021

SuperReturn North America Virtual

May 4-6, 2021
CT/UTC -5 Time Zone
Virtual event

Dedicated networking time

8:30am - 9:30am
Day Three: Energy

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Welcome address

9:30am - 9:35am
Day Three: Energy

Secular and cyclical trends in energy investing: what's the energy industry of the future?

9:35am - 10:15am
Day Three: Energy

Is there a truly systemic shift on the horizon or are current trends more cyclical in nature? Where does the future of the energy sector lie in a post-pandemic world? What systemic forces, policies, regulations and mandates are impacting the future of the sector?

Participants

Moderator: Christopher Godfrey - President, CEPRES

Panelists: Evan Corley - Partner, Pantheon

Mark Florian - Group Head – Global Energy & Power Infrastructure Funds, BlackRock Alternative Investors

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

Adam Waterous - CEO & Managing Partner, Waterous Energy Fund

The numbers that matter: taking stock of energy investment trends

10:20am - 10:50am
Day Three: Energy

A look at fundraising, recent deals and performance for conventional and renewable investments

Participants

Alex Murray - Vice President of Research Insights, Prequin

Jordan Poulter - Senior Research Associate, Research Insights, Prequin

Dedicated networking time

10:50am - 11:35am
Day Three: Energy

Dedicated time to catch up with peers and business contacts. You can schedule one-to-one or group meetings in designated time slots. All meetings will be held through a secure video conferencing solution.

Connections: Restructuring outlook

10:50am - 11:35am
Connections Sessions

What options exist for companies coming out of a restructuring? What is the impact of a lack of capital and volatile valuations on a company's road to recovery?

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Participants

Discussion Leader: John Moon - Managing Director, Head, Morgan Stanley Energy Partners

Energy transition: alternative versus traditional energy and everything in between

11:35am - 12:15pm
Day Three: Energy

How do we transition from economies that are predominantly reliant on oil and gas to a clean energy future? What emerging technologies, creative thinking and innovative solutions fit at the intersection of traditional and alternative energy? To what extent is diversifying into energy transition an attractive risk/reward profile and how can traditional firms reinvent themselves and what happens to those that fail? Oil and gas and clean energy don't have to be mutually exclusive: what role does oil and gas have to play?

Participants

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

Panelists: Glenn Jacobson - Partner, Trilantic North America

Meghan Leggett - Principal, White Deer

Kellie Metcalf - Managing Partner, Energy Transition, EnCap Investments

The LP perspective: what's worth the risk?

12:20pm - 1:00pm
Day Three: Energy

As the industry moves from growth to cashflow will investors see a return on their investments? What are the drivers for putting money to work in the energy sector? What are LPs looking for when it comes to new energy – can new energy meet LPs' criteria when it comes to risk, return and ticket size? And how are LPs viewing existing oil and gas investments – is there hope for recovery? Oil and gas versus new energy: which holds the greater policy risk?

Participants

Moderator: Thomas Martin - Partner, Head of Private Equity & Real Assets Research, Aksia

Panelists: Michael Felman - President & CEO, MSF Capital Advisors

Mina Pacheco Nazemi - Managing Director, Barings

Dedicated networking time

1:00pm - 1:45pm
Day Three: Energy

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Connections: Oil prices: what's a viable base rate?

1:00pm - 1:45pm
Connections Sessions

On a full cycle basis, what is the minimum price per barrel to cover all operating, general and administrative costs and justify further drilling?

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Participants

Discussion Leader: Arthur Budge - President & CEO, Five States Energy Capital

The confluence of energy and technology

1:45pm - 2:25pm
Day Three: Energy

As oil and gas gives way to alternative energy sources, how are GPs transitioning and approaching power, telecommunications, battery technology and electrification? Where does technology fit in and how can LPs and GPs prepare for the next generation of energy investments?

Participants

Moderator: Julian Pearson - Founding Partner, FirstPoint Equity

Panelists: Bill Green - Managing Partner, Climate Adaptive Infrastructure

Ralph Witt - Managing Director, Barings

Sarah Wright - Founder and Managing Partner, Hull Street Energy

Is oil and gas ready for the road ahead: supply and demand outlook and the path to 2050

2:30pm - 3:10pm
Day Three: Energy

What do we expect to happen to supply and demand and the impact on oil prices? As global economies recover and we see a reverse of the cyclical shift, will we be at risk of a supply gap? When are we likely to see a return to pre-pandemic levels and when will oil demand hit its peak? Can the oil and gas industry transition to net zero and when might that be?

Participants

Panelists: Arthur Budge - President & CEO, Five States Energy Capital

Edward Geiser - Managing Partner and CEO, Juniper Capital

Shaia Hosseinzadeh - Managing Partner & Founder, OnyxPoint Global Management

Climate change and a clean energy future: what is our role?

3:15pm - 3:55pm
Day Three: Energy

How do LPs and GPs want to invest in this sector: are their views changing as we look ahead to 2035 and 2050? What emerging subsectors are an attractive proposition and what about traditional sectors? How can managers and investors evaluate which buckets are right for them? How is the industry approaching the effects of climate change and what's the cost?

Participants

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

Panelists: Cody Evans - Partner, Homecoming Capital

Matthew Saverin - Associate Director, UTIMCO

JW Sikora - Managing Partner, Co-Founder, Cibolo Energy Partners

Chair's closing remarks

3:55pm - 4:00pm
Day Three: Energy

End of SuperReturn North America Virtual 2021

Dedicated networking time

4:00pm - 6:00pm
Day Three: Energy

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12:00PM		12:20pm - The LP perspective: what's worth the risk?
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2:00PM		2:30pm - Is oil and gas ready for the road ahead: supply and demand outlook and the path to 2050
3:00PM		3:15pm - Climate change and a clean energy future: what is our role? 3:55pm - Chair's closing remarks
4:00PM		4:00pm - Dedicated networking time