

# LPGP PRIVATE DEBT CONFERENCE

# AGENDA

## 13TH MARCH 2018, LONDON

## 4TH ANNUAL LPGP CONNECT PRIVATE DEBT CONFERENCE

13TH MARCH 2018

00 Days 00 Hours 00 Minutes 00 Seconds

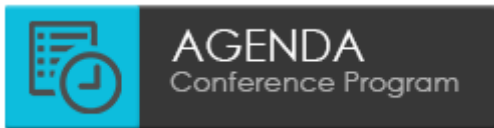
LPGP Connect 4th annual Private Debt conference brings together 250 LPs and GPs from the global private debt community to analyse the latest trends in the market, discover new investment opportunities and build meaningful business relationships for long term growth.



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Conference Home

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**8:30am – 9:00am Registration**



**9:00am – 9:10am Opening keynote – Head of Private Debt – Preqin**



**9:15am – 9:55am Private debt outlook: what are the latest developments**

How is the investor profile developing as the asset class comes of age?  
How do managers expect dealflow to develop over the next 12-18 months?  
How are fund managers progressing with putting money raised to work?  
With continued geopolitical uncertainty what are the potential risks?  
Is consolidation inevitable and how will investors be affected?



**9:55am – 10:35am Assessing a manager: what should investors look for?**

What constitutes a typical managers due diligence, does it change according to each strategy?  
What mistakes do managers often make when evaluating deals?  
New managers: how to best assess them?  
Managing the asset duplication risk through portfolios



**10:35am – 10:55am Presentation**





## **10:55am – 11:30am Networking break**



## **11:30am – 12:10pm Direct Lending: how to thrive in a competitive market**

Deal origination, how does it differ from sponsor led transactions?

Is the direct lending market overcrowded with too many lenders, are there enough deals?

Can the appeal of the strategy be maintained and will investors continue to allocate?

How promising are sponsorless strategies and can they mitigate this evolution?



## **12:10pm – 12:50pm strategies, products, risks and returns**

How can investors become better educated about the asset class?

Do higher returns outweigh the increased risk of non-sponsored lending?

Which strategies and products offer the most attractive returns and why?

How does private debt compare to other asset classes?



## **12:50pm – 2:20pm Networking lunch**



## **2:20pm – 3:00pm Views from the LPs: what is the appeal of private debt and wh**

How do LPs maximise the effectiveness of their allocations to private debt?

Why are investors opting for sponsorless lending over the alternatives?

What are the biggest concerns for new investors?

Fees and alignment of interest, do LPs feel their expectations are being met?



## **3:00pm – 3:40pm How will debt funds continue to innovate and adapt to challer**

How does the current credit cycle compare historically?

With increased competition, how are managers differentiating themselves?

Given the increasing levels of dry powder, will debt funds take on riskier deals?

Will allocations to private debt become as large as allocations to private equity?



## **3:40pm – 4:10pm Networking break**



## **4:10pm – 4:50pm Spectrum of opportunities within the asset class**

Do investors understand the products fund managers are offering?

Distressed investing: how does the risk/return profile compare against other debt investments?

Real estate- evaluating prices and recent changes

Infra Debt – Asset class profile/attractions

Where to allocate funds to private debt and why?

## **4:50pm – 5:30pm Global horizons: identifying regions that will provide the best**



How does the US market compare with Europe currently?

Investor appetite: what trends are managers seeing from LPs as the asset class continues to mature.

What are the challenges facing managers when educating the market on developing regions?

Asia, Latam and Africa, how big is the opportunity? should LPs stick with traditional markets?



**5:30pm – 7:00pm Drinks Reception & Buffet – Hosted by Capitala Group and Ma**

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