

IPD South Africa Property Investment Conference
Extracting Value Through Real Estate Investment
Aug 13 – 14, 2015
Table Bay Hotel, V & A Waterfront, Cape Town

Draft Agenda

Aug 13, 2015

08:00 – 08:30	Masterclass attendees registration
08:30 – 10:00	Joining the dots between property fundamentals and the fund essentials. Same or different investment?
10:00 – 10:30	Conference attendees registration/arrival tea and coffee
10:30	Welcome by Stan Garrun, Executive Director: MSCI
10:40	Conference leader: David Williams, Senior Anchor: CNBC Africa Channel 410 and former Deputy Editor: Financial Mail

10:45 Session 1: The state of play.

South Africa is in the grip of uncertainty facing major risk in social, economic, political and doctrinal areas. But we are not alone – these are global challenges! Are we on a new trajectory of seismic change and instability? What is the impact on Real Estate? Top thinkers identify the 5 main game changers that will share the next 5 – 10 years.

12:50 Networking lunch

13:40 Session 2: The Investor – the who

Real Estate investment and its role in a multi asset portfolio. Are Asset Owners and allocators seeing Property – direct and listed, separate to other asset classes: equities, bonds, alternatives? Can property be seen as a distinct class in their allocations? Who are the real estate investors, what are their objectives and their 'Raison D'etat'?

15:10 Tea/coffee break

15:45 Session 3(a): The Beneficiary – the why and the how

Wealth creation, access and empowerment: IRR, liability, return, income growth, distribution, hedging, indexing, diversification

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Directors: Jamie Pawliczek, Stan Garrun, Linda Gamble

17:10 Open bar and strategic conversation

19:00 IPD South Africa Awards Dinner

At this function South Africa's property funds are recognised for top performance in their underlying ungeared property portfolios.

After dinner speaker: Zelda la Grange: served former South African President Nelson Mandela for 19 years in different capacities until his death on 5 December 2013.

Aug 14, 2015

09:00 Session 3(b): The Vehicle – the how

REITS, unlisted pooled funds, private funds, EFTS, derivatives, core, opportunistic, open ended and closed funds etc.

10:45 Tea/coffee break

11:20 Session 4: The where to from here

Who, what, why and when – questions of stability, investment processes, globalisation, sustainability and the next big thing.

13:05 Wrap up: David Williams

13:20 Networking lunch

SPEAKERS AND AGENDA ARE SUBJECT TO CHANGE

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