

MSCI/IPF PROPERTY INVESTMENT CONFERENCE

23-24 November, 2017

The Grand Hotel

Brighton, UK



MSCI



Investment
Property Forum

PROGRAMME

DAY ONE

THURSDAY, 23 NOVEMBER, 2017

9:00 a.m. REGISTRATION AND REFRESHMENTS

10:00 a.m. CHAIRMAN'S INTRODUCTION

Alex Jeffrey, *Chief Executive, M&G Real Estate*

10:15 a.m. SESSION 1: THE NEW ECONOMIC AND FINANCIAL WORLD ORDER

Keynote presentation:

A medium term perspective on UK growth prospects in the context of national re-alignment.

Stephen King, *Senior Economic Adviser, HSBC* and *author, Grave New World*

11:15 a.m. REFRESHMENT BREAK

11:45 a.m. SESSION 2: DEBT DROUGHT OR TRIUMPH OF RESTRAINT?

An examination of the changing structure of real estate debt provision in the UK, and how this is affecting investment and development.

Speaker:

John Feeney, *Head of Global Corporates, Lloyds Bank*

Respondent:

Timon Drakesmith, *Executive Director and Chief Financial Officer, Hammerson*

Panellists:

Barry Fowler, *Managing Director, Alternative Income Solutions, Aviva Investors*

Natalie Howard, *Partner & Head Of Real Estate, AgFe*

1:00 p.m. LUNCH AND NETWORKING

2:15 p.m. SESSION 3: RESILIENCE AND RISK IN GLOBAL GATEWAY AND SECOND-TIER CITY PERFORMANCE

Are larger 'global' cities 'safer' or 'better' real estate investment markets, or do these cities have potential downsides that may favour second tier locations?

Speakers:

Will Robson, *Executive Director and Global Head of Real Estate Applied Research, MSCI*

Alice Breheny, *Head of Global Real Estate Research, TH Real Estate*

Panellist:

Christopher Choa, *Principal, Cities and Urban Development, AECOM*

SPONSORS:



MEDIA PARTNERS:



ACCREDITATION:



(8.25 hours)

3:45 p.m. REFRESHMENT BREAK

4:15 p.m. **SESSION 4: THE PENSIONS REVOLUTION AND REAL ESTATE: INTERNATIONAL LESSONS FOR UK INVESTMENT**

In light of LGPS reforms and other moves by UK pension funds to pool their real estate investments and reduce costs, what can UK businesses learn from the international experience?

Potential implications of pension funds pooling their real estate holdings

Pal Sarai, *Managing Director, Head of Client Consulting EMEA, Australia & Asia, bfinance*

Panellist:

Patrick Kanters, *Managing Director Real Assets, APG Asset Management*

Further speakers to be announced

5:30 p.m. CLOSE OF DAY ONE

7:15 p.m. DRINKS RECEPTION

8:00 p.m. GALA DINNER

After dinner comedian:

Josh Widdicombe

DAY TWO

FRIDAY, 24 NOVEMBER, 2017

9:30 a.m. **SESSION 5: IPF RESEARCH UPDATE**

Session chairman:

Rob Martin, *Research Director, LGIM Real Assets*

11:00 a.m. REFRESHMENT BREAK

11:30 a.m. **SESSION 6: OPINION-BASED DATA IN THE POST-TRUTH ERA: CAN IT BE TRUSTED?**

Recent political history has given mixed messages on the reliability of opinion polling. This may hold lessons for using survey data more widely in business and economics. Should we be taking more notice of 'emotional' data rather than relying on traditional statistics in making investment decisions?

Keynote speaker:

Peter Kellner, *Former President, YouGov*

12:50 p.m. **CHAIRMAN'S CLOSING REMARKS**

Alex Jeffrey, *Chief Executive, M&G Real Estate*

1:00 p.m. CLOSE OF CONFERENCE FOLLOWED BY LUNCH

CONFERENCE FEES

CLIENT (MSCI Client/IPF Member):

£1,750 + VAT*

NON-CLIENT:

£1,950 + VAT*

To book your place, please register at
msci.com/brighton2017
or e-mail
event_inquiry@msci.com

*All registrations include accommodation.



Investment
Property Forum

msci.com

ipf.org.uk

#MSCI_IPF2017

