



Portfolio management course

02 July 2024, Copenhagen



Both accomodation at the hotel and the group dinner are included in the course fee.

Location to be confirmed

19:00

Group dinner



academy@inrev.org

+31 (0)20 235 86 02

www.inrev.org



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Copenhagen Marriott Hotel
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1560 København, Denmark

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08:45

Registration

09:00

Course introduction

- Course objectives

Christian Delaire, Independent Board Member (course leader)

09:30

Monitoring an existing portfolio

- What are the organisational choices to manage an indirect portfolio?
- As an investor, how close do you need to be to your investments?
- Asset versus portfolio level
- Risk management and managing style drift

Andrew Strachan, Asset Manager Indirect Investments, PIMCO Prime Real Estate

10:15

Reporting and day-to-day operational management

- Day-to-day operational management
- Needs and demands of reporting
- Standard reporting tools, e.g. INREV SDDS
- Managing deviations from expectations
- Benchmarking and comparison with market indices

Sander Veltman, Senior Portfolio Manager International Real Estate, Syntrus Achmea Real Estate



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11:00

Coffee break

11:30

Buy, sell and hold process

- Performance benchmarking
- Sustainability benchmarking
- Forward looking analytics and analysis
- Other factors

Marteen Jennen, Senior Director – Strategist Private Real Estate, PGGM Investments

12:15

Governance: role of the investor and best practices

- Appropriate governance for different structures
- Key LPAC issues and challenges
- How to make JV's function
- Key learning points / best practice

Neil Harris, Head of Real Estate, Private Markets, UBS Wealth Management International

13:00

Lunch



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- 14:00 **Liquidity and secondary trading considerations**
- Liquidity for Open End Funds in uncertain times
 - Secondary market trading
- Marianne Hemon-Laurens, Deputy Fund Manager, LaSalle Encore+, LaSalle Investment Management
- 14:45 **Case study including a coffee break**
- 16:15 **Straight talking: Q&A session**
- Neil Harris, Head of Real Estate, Private Markets, UBS Wealth Management International
& Christina Eckert, Head of Real Estate, PBU
- 17:00 **Wrap-up**
- 17:15 **End**