



INREV Portfolio Management Course

13 September 2023, Paris

●
**Brasserie La Lorraine, 2
Place des Ternes,
75008 Paris**

●
*Please note that accommodation at the hotel is **not** included in the course fee. The group dinner is included.*

19:30 **Group dinner**
Brasserie La Lorraine, 2 Place des Ternes, 75008 Paris

●
training@inrev.org
+31 (0)20 235 86 02
www.inrev.org



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08:45

Registration

09:00

Course introduction

- Course objectives

Christian Delaire, Fonciere Atland (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, 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, 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

Maarten Jennen, PGGM

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, UBS Wealth Management

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, LaSalle Investment Management
- 14:45 **Case study including a coffee break**
- 16:15 **Straight talking: Q&A session**

Neil Harris, UBS Wealth Management
Second speaker to be confirmed
- 17:00 **Wrap up**
- 17:15 **End**