



Private Equity and Venture Capital Clean Energy Investor Forum

One Whitehall Place, London - 19 May 2009

Presented by



In association with



A full-day, invitation-only forum targeted exclusively at LPs, GPs and corporate investors, to facilitate the exchange of the latest knowledge and ideas and provide face-to-face networking opportunities with leaders in the clean energy investor community.

Objectives

To enable **Limited Partners** who have an interest in the sector:

- ▶ To enhance their understanding of the economics, key trends, developments and investment opportunities in the sector
- ▶ To formulate a view on the place of clean energy funds in their investment portfolios
- ▶ To identify potential GPs to track, build relationships with or to invest in

To enable **General Partners** who invest in the sector or who are committed to environmental best practice in their portfolio companies:

- ▶ To interact with their peers to analyse market developments and to identify potential partners and investment opportunities
- ▶ To meet and establish relationships with the most relevant LPs and corporate investors
- ▶ To understand what LPs expect from GPs in terms of environmental responsibilities

To enable **Corporate Investors**:

- ▶ To review and share their outlook on the market and views on corporate activity and responsibility
- ▶ To identify attractive investment areas and build

Sessions

I. LP panel: LP Appetite for Clean Energy Funds

- ▶ Is now the right time to commit to clean energy funds?
- ▶ Is this a genuine investment opportunity, or just a bubble?
- ▶ What are the barriers to investing and what skills and knowledge do LPs need?

II. Fund of Funds Presentation: Investing in Clean Energy Funds

- ▶ Are funds of funds an efficient way of allocating to the sector?
- ▶ What should investors be looking for in a clean energy fund of funds?
- ▶ Do generalist funds of funds have the necessary experience in this sector?

III. GP Panel: Responsibilities for Generalist Buy-out Firms

- ▶ How are buy-out firms addressing their environmental responsibilities?
- ▶ What policies and actions are they implementing in their portfolio companies?
- ▶ How demanding are institutional investors in requiring these changes?

IV. Infrastructure Presentation: Clean Energy Infrastructure

- ▶ Why should LPs, who normally invest in private equity, be interested?
- ▶ What are the economics and the risk/reward characteristics, compared to standard private equity?
- ▶ Which sectors and geographies are able to generate the most attractive, risk-adjusted returns?

V. VC Panel: Navigating the Cleantech Investing Landscape

- ▶ How are VCs identifying new opportunities?
- ▶ Which are the main technologies and sectors offering the most attractive returns going forward?
- ▶ What are the key criteria that investors look for in a cleantech company?

VI. Corporate Presentation: Why Corporate Investors Have a Central Role in the Clean Energy Industry

- ▶ What role does corporate venture capital play in developing new technologies?
- ▶ What strategies do corporate investors have for identifying and investing in these areas?
- ▶ What benefits can a programme of investment in this area bring to the company as a whole?

VII. LP panel: Constructing a Portfolio of Clean Energy Funds

- ▶ How can an investor best construct a portfolio when there are relatively few experienced managers?
- ▶ How can you best manage the risk and diversification?
- ▶ What are the pitfalls and how can they be avoided?



Our mission is to inform and connect the global clean energy investor community. We aim to promote and facilitate investment in innovation by providing the latest news, views and analysis and by organising exclusive networking events between the leaders, experts and shapers of the industry.



AltAssets is the world's most widely read source of information on the private equity industry. Our online site receives over 400,000 unique impressions per month, downloading up to 3 million pages of information. We also arrange selective forums and seminars which attract exclusive audiences of leading institutional investors.