

DFW Institutional Investment FORUM
April 20, 2021 Roundtable Discussion
Infrastructure Investing

Topic: “**Infrastructure Investing; What a Global Pandemic has Taught us About the Asset Class**”

Moderator: Scott Freeman, LCG Associates
Panelist: Jenny Chan, Macquarie Asset Mgt
Panelist: Pradeep Killamsetty, Manulife

Topics to probe:

What are lessons for prospective investors?
Impact on sectors, Liquidity, Correlations
Interest rate sensitivity
Macroeconomic sensitivity
Strategies that fared well and didn't fare well.
What's changed and what's stayed the same?

Scott M. Freeman, LCG Associates - Senior Vice President/Principal

Mr. Freeman joined LCG in 1990. He is a Senior Vice President and Principal in LCG's Dallas, Texas office. Scott is a member of the Board of Directors and serves on the Investment and Risk Management Committees. He also consults to several of the firm's largest clients including healthcare organizations, foundations, university endowments, and corporations. In addition to lead consultant responsibilities, he serves as the Healthcare Team Leader and conducts capital market and manager research. Scott has 36 years of finance and investment experience, the past 31 with LCG. Before joining LCG, he held other positions in the investment industry. Scott earned a B.B.A. in Accounting from the University of Notre Dame. Scott and his wife, Cindy, have seven children.

Jenny Chan, Macquarie Asset Mgt - Managing Director, Portfolio & Strategy

Jenny is a Managing Director with MIRA and is currently the Head of Portfolio and Strategy for MIRA's North American Private Funds. Prior to this role, Jenny had responsibility for developing and executing the debt capital management strategy across MIRA portfolio assets and new acquisition targets. Jenny began her career with Macquarie as a graduate in 2001. Before joining the MIRA New York office in 2015, she worked in the Macquarie Capital advisory business and Macquarie's direct lending business, making credit investments on behalf of Macquarie Bank Limited. In her role, Jenny advised on the acquisitions of Hawai'i Gas and the Dulles Greenway. She earned her Bachelor of Commerce (Honors) and Bachelor of Laws (Honors) from The University of Queensland.

Pradeep Killamsetty, Manulife - Managing Director, Power & Infrastructure Group

Pradeep joined John Hancock in 2012 and is responsible for origination and execution of debt and equity investments in the power, utility, and infrastructure sectors. He currently manages over US\$ 4.5 billion of the Team's portfolio. He has worked in the power sector since 2006, as an investor, developer, and as a financial advisor to power companies. After graduating from business school, he joined Credit Suisse's power and utilities investment banking group. At Credit Suisse, he was involved in M&A advisory and financing assignments for various power sector clients. After Credit Suisse, he joined Competitive Power Ventures where he helped develop and finance about 1,000 MW of gas fired and renewable power projects. Mr. Killamsetty holds an MBA from University of North Carolina, an MS in Mechanical Engineering from University of Alabama and received his Bachelor of Engineering from Andhra University.