

Japan's Energy Security In A Multipolar World

AGENDA – OCTOBER 30, 2026

9:00 AM – 9:10 AM	Welcome Remarks - Yoshihiro Hyakutome, Deputy President Executive Officer, Co-Head of Global Banking Unit, <i>SMBC Group</i> - Peter Bowden, Global Head of Industrial, Energy & Infrastructure Investment Banking, <i>Jefferies</i>
9:10 AM – 9:30 AM	Keynote: A View from Washington - Richard Fisher, Former President, <i>Federal Reserve Bank of Dallas</i>; Former Deputy U.S. Trade Representative; Senior Advisor, <i>Jefferies</i> - Moderated by Michael Eastwood, Director of Americas Research, <i>Jefferies</i>
9:30 AM – 9:55 AM	Keynote: Shell Scenarios—Energy Security, Technology and the Future of Growth - Mallika Ishwaran, Group Chief Economist, <i>Shell</i>
9:55 AM – 10:20 AM	Keynote: Global Energy Outlook—A Market Perspective - Amrita Sen, Founder, <i>Energy Aspects</i>
10:20 AM – 10:50 AM	Energy Security for Japan in a Multipolar World - Mallika Ishwaran, Group Chief Economist, <i>Shell</i> - Amrita Sen, Founder, <i>Energy Aspects</i> - Takuto Kawamura, Executive Officer & Head of Global Investor Relations Group, <i>JERA</i> - Moderated by Lloyd Byrne, Head of U.S. Energy Research, <i>Jefferies</i>
10:50 AM – 10:55 AM	Break
10:55 AM – 11:40 AM	Power Supply—Demand in the Era of AI & Data Center Expansion - Hiromichi Nozaki, Chief Technology Officer & Senior Managing Executive Officer, <i>Microsoft Japan</i> - Paul Walker, Vice President of APAC Design & Construction, <i>Equinix</i> Moderated by Alex Thomas, EMEA Head of Digital Infrastructure, Investment Banking, <i>Jefferies</i>
11:40 AM – 12:25 PM	Outlook for Next-Gen Energy Solutions - Emmanuel Lagarrigue, Global Co-Head of Climate Transition & Head of Sustainability, <i>KKR</i> - Ramsey Hamady, Chief Financial Officer, <i>NuScale Power</i> - Cam Hosie, Senior Vice President, <i>SLB New Energy and Industrial</i> - Moderated by Ananth Shankar, Managing Director, Energy Investment Banking, <i>Jefferies</i>
12:25 PM – 12:50 PM	Fireside Chat: Investment Opportunities for Japan's Energy Security - Vikas Pershad, Portfolio Manager, Asian Equities, <i>M&G Investments</i> - Julien Dumoulin-Smith, Head of U.S. Power, Utilities, & Midstream Clean Energy Research, <i>Jefferies</i>
12:50 PM – 12:55 PM	Concluding Remarks: Energy, Technology and Growth—SMFG Perspective - Masayuki Takanashi, Executive Officer & Group Chief Sustainability Officer, <i>SMFG</i>
12:55 PM – 1:35 PM	Lunch
1:40 PM – 2:40 PM	Breakout Sessions
	Breakout 1 – Nuclear - Ramsey Hamady, Chief Financial Officer, <i>NuScale Power</i>
	Breakout 2 – Renewables - Julien Dumoulin-Smith, Head of U.S. Power, Utilities, & Midstream Clean Energy Research, <i>Jefferies</i>
	Breakout 3 – Carbon Capture and Storage & Carbon Removal - Ananth Shankar, Managing Director, Energy Investment Banking, <i>Jefferies</i>
	Breakout 4 – AI & Data Centers - Alex Thomas, EMEA Head of Digital Infrastructure, Investment Banking, <i>Jefferies</i>